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Tabletop & Giftwares

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TABLETOP & GIFTWARES

Market Trends

The continuing diversification by tabletop companies into related merchandise and gift categories in 1986 remains a significant aspect of the industry. In the face of generally flat tabletop sales, producers are attempting to stimulate business by strengthening their positions and becoming more like one-stop shops for the retailer.

Indicative of this market strategy is the proposed Waterford-Wedgwood merger, combining two of the leading names in the industry and creating the largest crystal and china producer in the world. Sagging dinnerware sales has prompted Noritake to expand into the gift category, with the goal of becoming a fully diversified tabletop firm; it is also anticipating a move into flatware. Efforts such as these are increasingly common as the industry copes with underutilized plants and foreign currency fluctuations. Many seem to agree that giftwares is the way to go, entering a big, self-generating market whose potential is enormous. What follows is a review of current trends in the major related categories: silverware and plated ware; dinnerware; glassware/crystal; and giftwares.

Sterling Silverware and Plated Ware

The overall flatware market in the United States remains flat. The slowing of the economy coupled with an increase in imports and a decrease in exports has contributed to sluggish sales for some major domestic producers. This has led to excess inventories, operating losses and layoffs of employees.

Among companies experiencing difficult times is Towle Manufacturing Co., which reported a loss from continuing operations of $5.4 million in the second quarter of 1986. The company expects 1986 annual sales to be half of last year's. Towle expects sales to be about $100 million this year, following the restructuring of its operations due to its Chapter 11 filing under the bankruptcy code, compared to $200 million in 1985. Lower selling prices from inventory reduction programs and customer concerns about the company's status have compounded its problems.

As recently as 1981, Towle scored record profits while becoming the largest U.S. silver and giftware company. Towle, like its competitors, had a huge drop in sterling flatware sales a few years ago as silver prices dropped from $50 an ounce to $10. The resulting decline in sales squeezed Towle's profits, in particular, because the company had moved into low-end silver holloware, where margins are thin.

With sterling now stabilized at about $5.60 an ounce, many industry observers feel that sterling flatware and pieces are ready for a strong comeback. They cite expected increases in discretionary purchasing power over the next few years provided by affluent single professionals, later marriages that yield substantial two-income familes, and the aging of the baby-boom generation into its high-income middle age years. This will help domestic silverware manufacturers who generally focus on the high end of the market.

(continued)

Sterling Silverware and Plated Ware (continued)

While business in sterling silver pieces and silverplate is generally slow in the U.S. market, there are exceptions, such as Christofle and Ricci. Silverplate business, buoyed by strong promotions, is proving profitable for several producers this year. There is a trend toward larger European sizes in knives and forks, to coordinate with larger china sizes. Promotional gift sets range from $99 to $299. Silverplated holloware remains popular, particularly as gifts. Sales of silverplated and sterling holloware total $300 million at retail.

Outpacing both sterling and plate has been upper-end stainless steel products. They appeal to many working women who do not have the time or the inclination to clean and polish silver. Gold accent in stainless has been on a strong upward trend. They are a compliment to the earthtones now dominant in dinnerware and should be seen well into the spring next year. In high-end stainless, a $40 price point for a place setting is very popular.

In 1986, there has been a renewed emphasis on housewares, mass flatware and cutlery by companies such as Oneida Ltd. Colored plastic-handle flatware is considered a growing segment of the housewares department at mass merchandiser channels where upgraded fashion flatware is making its way into the classification. Major companies are diversifying into other tabletop and giftware areas, such as Reed & Barton, with its recent acquisition of Herco Art, a producer of brass lamps. Sculptural pieces have also been attractive to silver resources.

Dinnerware

Dinnerware business has been generally flat over the last two and a half years, but not for all suppliers. Some have bucked the trend, while not engaging in the extensive price-promoting activity that has characterized the industry.

Lenox China, for one, has maintained a good price-value relationship by not pursuing heavy discounting. It continues its focus with traditional channels of distribution, principally department stores, specialty stores, jewelry stores and gift operations. Its formal business remains strong through cut-backs on unproductive patterns and with large advertising expenditures aimed at raising consumer awareness.

Another firm having a very good 1986 is Noritake, which has clearly emerged as a leading dinnerware manufacturer. Sold through china and crystal departments, Noritake is one of the few manufacturers that works in all materials: bone and ivory china, porcelain, earthenware and stoneware. During the past two years, the firm has expanded its design base to include upscaled formal and casual, to the point that Bloomingdale's bought a modified Noritake program for the first time this year.

Noritake has been consistent in its designs over the years. While others concentrated on the fast moving, fashion-forward segment of the market led by Mikasa, Noritake has catered to the bridal market, which now accounts for at least 45% of the industry's overall dinnerware business. In addition, the firm has held its ground in the face of a fluctuating yen rate that has squeezed profit margins at many firms, including Mikasa. Noritake has held prices for two seasons. The company also is making inroads in the crystal market and in gift accessories, one of its fastest growing categories.

(continued)

Market Trends

Dinnerware (continued)

Dinnerware, which at one time sold solely through department stores and specialists, is now moving through broader distribution channels such as mass merchants, catalog showrooms and warehouse clubs. Mass merchants and chains are devoting more space to dinnerware, carrying bigger assortments and venturing into higher price points. They are expanding their assortments to include fashion and basic dinnerware designs and accessories with improved packaging and in-store displays. K mart is hoping to stimulate its dinnerware business by boosting advertising expenditures 20%, primarily in newspaper ads.

There is now more willingness on the part of major suppliers in developing the mass merchandise business. Several companies like Mikasa, Noritake, and Pfaltzgraff have launched divisions specifically catering to mass merchants. Others like Anchor Hocking, Corelle and International China have developed programs geared to this channel. Sources estimate that mass merchants generate as much as $40 million in dinnerware sales, relying on the kind of volume it's difficult to attain in department stores. Some executives feel that department stores are making a mistake by creating competitive situations in their own stores by selling dinnerware both in dinnerware and housewares departments.

Consolidation in the dinnerware industry has led to large acquisitions. Several British china makers, for example, have been taken over in recent years: Royal Doulton by Pearson; Aynsley by Waterford; and Royal Worcester and Spode by the London International Group. As noted, the Waterford Glass Group of Ireland is in the process of acquiring Wedgwood, Britain's leading maker of fine china. Wedgwood has slipped recently in many major markets, losing ground to European and Japanese rivals, especially Noritake. Waterford should be able to help Wedgwood's marketing in the U.S. market. North America presently accounts for 32% of Wedgwood's sales.

Glassware/Crystal

Waterford's $360 million offer for Wedgwood would make the combined group the largest crystal and china producers in the world with total annual sales of nearly $400 million. Waterford, the 37 year old Irish company whose name has been synonymous in the U.S. with fine handmade crystal, is one of the world's largest producers, with sales of $160 million in 1985. More than 50% of its sales are generated in the U.S., making it the best-selling crystal brand. Its association with Wedgwood is expected to give the company increased access to markets where it does not presently have much penetration, such as Australia and Japan.

In the last few years, Waterford's profits have increased sharply as it has straightened out distribution problems in the U.S. and pulled back from a diversification into other fields such as automobile distribution. In addition, Waterford is broadening its appeal in the U.S., directing its marketing efforts not only to the bridal market and well-to-do middle-aged women, but also to affluent baby boomers of both sexes who have a taste for expensive household furnishings. Waterford has been facing competition for its U.S. share of market from, in particular, Baccarat and Saint Louis of France, Val St. Lambert of Belgium, and Lenox Crystal, the biggest U.S. maker of hand-cut crystal.

(continued)

Glassware/Crystal (continued)

Glassware sales in the U.S. are increasingly competitive. Market conditions have fostered aggressive pricing and marketing strategies by suppliers, particularly in the areas of multiple-piece beverage sets, glass serveware, and lead crystal stemware products. In addition, department and specialty stores are pursuing new strategies to revitalize the decorative barware business.

With its introduction of a lead crystal collection, Libbey Glass is continuing to upgrade its product lines. In the past two years, the company has marketed upscaled merchandise, coupled with a sophisticated advertising campaign, to win back department store business that had been going almost exclusively to importers. Libbey is hoping that this new line will further enhance the company's image, while helping its thrust for the 18-35 year old female customer. The line is expected to appeal to those looking for lead crystal that falls between the everyday and the high end.

As is the case with dinnerware companies, glassware producers are actively seeking alternate channels of distribution such as warehouse clubs and catalog showrooms. Some major resources like Durand, Toscany, Colony and Anchor have separate divisions to service these accounts. Most companies approach these outlets with caution due to their relative newness and so as not to jeopardize department store accounts. However, few major producers can afford to overlook them.

The decorative barware business has been experiencing mixed results of late. Some department stores are hoping to stimulate sales by moving the merchandise to gift departments and selling the products as part of a theme merchandising campaign, for example, "tropical summer entertaining." Other stores are moving barware into housewares departments, making the products "lifestyle items." What retailers do agree upon is that the popularity of wine and lower sales of other alcoholic beverages has hurt sales, particularly ice buckets and drink glasses.

Giftwares

The gift business has matured to the point that it is a viable business in its own right, attracting many large tabletop companies. The sluggishness of the tabletop business over the past few years has prompted these companies to seek ways to employ underutilized manufacturing facilities. Flat tabletop sales has limited the areas that many china, silver and crystal producers can expand into. Some of these markets tend to be finite: a customer buying fine dinnerware, for example, will probably not be buying more than replacement pieces for many years, if ever.

Most executives say that the gift business has infinite potential, with people constantly in the market to buy gifts. Tabletop companies see gifts as a way of leveraging themselves into a large market with high profit margins, enabling them to improve their financial structure. The gift market is diversified enough to allow more manufacturers to be in it without oversaturating the market than is the case with tabletop.

(continued)

Giftwares (continued)

Many tabletop producers have discovered that their gift lines tie in effectively to their overall merchandising programs. Their products already have name recognition, an important consideration in the impulse oriented world of gift buying. Purchases are less price sensitive and more brand sensitive. When a customer gives a gift the name is very important, whether it's Lenox, Waterford, Towle, Villeroy & Boch, etc.

Many of the tabletop manufacturers are distributing their gifts through department stores, utilizing the same buyers that handle their traditional products. Some have gift lines that are merely boxed versions of previously open-stock items. Others have created full-blown gift collections and are utilizing gift buyers and gift stores. Reed & Barton, for example, has used new materials to develop lines including ceramic dinnerware, heavy-cut crystal, light-blown glass giftware and barware, plus items in pewter, brass and porcelain.

Giftwares companies, while acknowledging the competition provided by tabletop producers, are holding their own. By relying on their ability to discern changing trends in gift giving and their flexibility in production, they are able to change lines quickly. For example, Enesco changes its line more than 60% each year. Another advantage they have is their distribution to individual gift shops, a territory that the tabletop companies are just beginning to explore.

These independent single and multi-unit gift shops, which are estimated to number about 60,000, generally do not compete head-to-head with department stores. Their merchandise mix often includes items a department store would sell in departments other than gifts. The marketing of tabletop gift lines down from department stores to gift stores is a reversal of the usual trend. As has been the case often in the past, department stores pick up on merchandise that is proving popular at the specialty shops, taking away their sales. The retailing of dolls, for instance, was a great category for gift shops until department stores came out with porcelain collector doll selections. Presently doing well are such collectibles as plates, figurines and porcelain pieces.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

A complete census of all manufacturers in the U.S. which have one or more paid employees is compiled every five years by the U.S. Bureau of the Census. Results from the latest, covering operations in the industries primarily involved in the production of tabletop and giftwares in 1982, are covered below. In addition, comparable figures are reported from the 1983 and 1984 annual surveys of manufactures. The Census Bureau conducts annual surveys using a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity during intercensal periods.

GENERAL INDUSTRY STATISTICS

Industry statistics on tabletop and giftwares are covered by five Standard Industrial Classification (SIC) codes: silverware and plated ware (SIC 3914); pressed and blown glass and glassware (SIC 3229); glass products, made of purchased glass (SIC 3231); vitreous china food utensils (SIC 3262); and fine earthenware food utensils (SIC 3263). Definitions of each code follow below.

Rising imports and falling exports have affected silverware and earthenware domestic producers most heavily. This has lead to falling industry shipments and layoffs of employees. Glassware and vitreous china shipments rose over the 1982-1984 period despite the proliferation of imports.

It should be noted that industry data covers the institutional market (hotels, restaurants, hospitals) as well as the consumer market.

Silverware and Plated Ware
(SIC 3914)*

	1984	1983	1982	1977	% Change 1984/82
Number of companies	na	na	199	247	--
Number of establishments **	na	195	208	258	--
Number with 20 or more employees	na	58	55	67	--
Employees, total (thous.)	6.7	8.4	9.1	10.8	-26.4%
Production workers (thous.)	4.7	5.9	6.5	8.3	-27.7
Payroll (mil. $)	$ 125.7	$ 137.4	$ 148.3	$119.8	-15.2
Value added by manufacture (mil. $)#	$ 242.3	$ 290.7	$ 311.9	$255.1	-22.3
Valued of industry shipments (mil. $)##	$ 547.0	$ 510.8	$ 583.9	$457.0	- 6.3
Capital expenditures, new (mil. $)	$ 9.4	$ 9.6	$ 11.8	$ 8.0	-20.3

Pressed and Blown Glass and Glassware
(SIC 3229)*

	1984	1983	1982	1977	% Change 1984/82
Number of companies	na	na	276	325	--
Number of establishments **	na	334	331	382	--
Number with 20 or more employees	na	125	116	125	--
Employees, total (thous.)	38.2	37.4	37.6	46.2	+ 1.6%
Production workers (thous.)	31.5	29.9	29.5	38.6	+ 6.8
Payroll (mil. $)	$ 834.8	$ 785.5	$ 726.0	$ 572.8	+15.0
Value added by manufacture (mil. $)#	$2,160.8	$2,022.8	$1,743.1	$1,452.8	+24.0
Valued of industry shipments (mil. $)##	$3,338.7	$3,106.1	$2,724.0	$2,120.1	+22.6
Capital expenditures, new (mil. $)	$ 181.4	$ 173.7	$ 233.3	$ 143.6	-22.2

(continued)

GENERAL INDUSTRY STATISTICS

Glass Products, Made of Purchased Glass
(SIC 3231)*

	1984	1983	1982	1977	% Change 1984/82
Number of companies	na	na	1,228	1,000	--
Number of establishments **	na	1,303	1,337	1,101	--
Number with 20 or more employees	na	381	387	325	--
Employees, total (thous.)	43.2	42.8	41.3	36.2	+ 4.6%
Production workers (thous.)	33.8	33.1	31.5	28.8	+ 7.3
Payroll (mil. $)	$ 816.9	$ 741.1	$ 696.3	$ 429.2	+17.3
Value added by manufacture (mil. $)#	$1,816.0	$1,644.4	$1,483.7	$ 960.2	+22.4
Value of industry shipments (mil. $)##	$3,734.3	$3,204.0	$2,976.5	$1,842.4	+25.5
Capital expenditures, new (mil. $)	$ 110.0	$ 72.2	$ 119.1	$ 73.4	- 7.6

Vitreous China Food Utensils
(SIC 3262)*

	1984	1983	1982	1977	% Change 1984/82
Number of companies	na	na	31	27	--
Number of establishments **	na	37	32	28	--
Number with 20 or more employees	na	21	20	14	--
Employees, total (thous.)	5.9	6.0	6.3	7.3	- 6.3%
Production workers (thous.)	4.7	4.7	5.1	6.0	- 7.8
Payroll (mil. $)	$ 108.9	$ 96.8	$ 98.0	$ 72.3	+10.2
Value added by manufacture (mil. $)#	$ 208.6	$ 218.3	$ 196.3	$ 140.0	+ 6.3
Value of industry shipments (mil. $)##	$ 274.8	$ 256.9	$ 241.6	$ 170.7	+13.7
Capital expenditures, new (mil. $)	$ 5.9	$ 7.3	$ 5.2	$ 5.4	+13.5

Fine Earthenware Food Utensils
(SIC 3263)*

	1984	1983	1982	1977	% Change 1984/82
Number of companies	na	na	38	22	--
Number of establishments **	na	37	38	23	--
Number with 20 or more employees	na	17	18	17	--
Employees, total (thous.)	1.8	2.6	3.0	4.7	-40.0%
Production workers (thous.)	1.5	2.1	2.5	3.5	-40.0
Payroll (mil. $)	$ 16.5	$ 32.5	$ 37.1	$ 38.4	-55.5
Value added by manufacture (mil. $)#	$ 27.5	$ 52.3	$ 61.6	$ 61.2	-55.4
Value of industry shipments (mil. $)##	$ 49.5	$ 73.1	$ 87.6	$ 81.3	-43.5
Capital expenditures, new (mil. $)	$ 0.5	$ 1.6	$ 1.7	$ 1.7	-70.6

(footnotes continued)

GENERAL INDUSTRY STATISTICS

na not available

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 3914 covers establishments primarily engaged in manufacturing flatware (including knives, forks, and spoons), hollow ware, toilet ware, and related products made of sterling silver; of metal plated with silver, gold, or other metal; of nickel silver; of pewter; or of stainless steel.

SIC 3229 covers establishments primarily engaged in manufacturing glass and glassware, pressed, blown, or shaped from glass produced in the same establishment. Includes barware, bowls, candlesticks, centerpieces, stemware and tableware.

SIC 3231 includes establishments primarily engaged in manufacturing glass products from purchased glass, covering cut and engraved glassware, decorated glassware and glass novelties (fruit, foliage, flowers, etc.).

SIC 3262 represents establishments primarily engaged in manufacturing vitreous china table and kitchen articles for use in households and in hotels, restaurants and other commercial institutions for preparing, serving, or storing food or drink.

SIC 3263 covers establishments primarily engaged in manufacturing fine (semivitreous) types of earthenware table and kitchen articles for preparing, serving, or storing food or drink.

** Each business location is counted as a separate establishment. Data on number of establishments in 1983 are from the Census Bureau's County Business Patterns.

Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in these industries. The value of primary products alone of these industries, plus the value of shipments by manufacturers classified in other industries is covered in the section on PRODUCT SHIPMENTS on page 13.

Source: U.S. Bureau of the Census,
1984, 1983 Annual Survey of Manufactures,
1982, 1977 Census of Manufactures

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in the Glassware Industry

	July Averages			Annual Averages		
	1986(p)	1985	% Change 1986/85	1985	1984	% Change 1985/84
Pressed and blown glass (SIC 3229)						
All employees (thous.)	42.9	42.0	+ 2.1%	44.7	47.4	-5.7%
Production workers (thous.)	34.3	33.4	+ 2.7	35.9	38.3	-6.3
Avg. weekly earnings	$437.06	$417.58	+ 4.7	$415.74	$401.88	+3.4
Avg. hourly earnings	$ 10.66	$ 10.26	+ 3.9	$ 10.24	$ 9.85	+4.0
Avg. weekly hours	41.0	40.7	+ 0.7	40.6	40.8	-0.5
Products of purchased glass (SIC 3231)						
All employees (thous.)	53.9	50.5	+ 6.7	50.5	48.3	+4.6
Production workers (thous.)	38.2	35.0	+ 9.1	35.2	33.6	+4.8
Avg. weekly earnings	$366.03	$343.85	+ 6.5	$348.09	$335.36	+3.8
Avg. hourly earnings	$ 8.82	$ 8.49	+ 3.9	$ 8.49	$ 8.12	+4.6
Avg. weekly hours	41.5	40.5	+ 2.5	41.0	41.3	-0.7

(p) preliminary

Source: U.S. Bureau of Labor Statistics, Employment & Earnings

Industry Concentration

Type of Company Ownership & Share of Shipments, 1982

	No. of Companies	Plants		Employees		Value of Industry Shipments	
		No.	%	Thous.	%	Thous. $	%
Silverware & plated ware	199	208	100.0%	9.1	100.0%	$ 583.9	100.0%
Multiunit companies	21	30	14.4	6.7	73.6	478.8	82.0
Single-unit companies	178	178	85.6	2.3	25.3	105.2	18.0
Pressed & blown glass	278	331	100.0	37.6	100.0	2,724.0	100.0
Multiunit companies	39	92	27.8	33.8	89.9	2,597.6	95.4
Single-unit companies	239	239	72.2	3.8	10.1	126.4	4.6
Products of purchased glass	1,228	1,337	100.0	41.3	100.0	2,976.5	100.0
Multiunit companies	123	232	17.4	25.1	60.8	2,098.5	70.5
Single-unit companies	1,105	1,105	82.6	16.2	39.2	878.0	29.5
Vitreous china food utensils	31	32	100.0	6.3	100.0	241.6	100.0
Multiunit companies	12	13	40.6	5.7	90.5	224.6	93.0
Single-unit companies	19	19	59.4	0.6	9.5	17.0	7.0
Fine earthenware food utensils	38	38	100.0	3.0	100.0	87.6	100.0
Multiunit companies	9	9	23.7	1.6	53.3	57.4	65.5
Single-unit companies	29	29	76.3	1.4	46.7	30.2	34.5

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, *Type of Organization* MC82-S-5

Industry Concentration (continued)

Share of Industry Shipments Accounted for by the Largest Manufacturing Companies, 1977, 1982

Industry	No. of Companies	Value of Shipments Total (Mil. $)	Percent Accounted for by: Top 4	Top 8	Top 20	Top 50
Silverware & plated ware						
1982	199	$ 583.9	59%	75%	87%	94%
1977	247	457.0	51	67	83	92
Pressed & blown glass						
1982	278	2,724.0	61	80	94	98
1977	325	2,120.1	61	78	92	97
Products of purchased glass						
1982	1,228	2,976.5	30	38	50	66
1977	1,000	1,842.4	31	39	53	68
Vitreous china food utensils						
1982	31	241.6	67	90	99	100
1977	26	170.7	71	94	99	100
Fine earthenware food utensils						
1982	38	87.6	63	81	98	100
1977	22	81.3	68	na	na	100

na not available

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Concentration Ratios in Manufacturing MC82-S-7

GENERAL INDUSTRY STATISTICS

Industry Concentration (continued)

Industry Statistics by Employment Size of Plants, 1982

Industry	Plants		Employment		Value Added By Manufacture		Value of Shipments	
	No.	%	No.	%	Mil. $	%	Mil. $	%
Silverware & plated ware	208	100.0%	9.1	100.0%	$ 311.9	100.0%	$ 583.9	100.0%
Plants with average employment of --								
1 - 19 employees	153	73.6	1.0	11.0	21.0	6.7	38.5	6.6
20 - 99 employees	37	17.8	1.4	15.4	35.6	11.4	105.7	18.1
100 or more employees	18	8.7	6.7	73.6	255.3	81.9	439.7	75.3
Pressed & blown glass	331	100.0	37.6	100.0	1,743.1	100.0	2,724.0	100.0
Plants with average employment of --								
1 - 19 employees	215	65.0	1.1	2.9	30.4	1.7	48.3	1.8
20 - 99 employees	44	13.3	2.3	6.1	73.4	4.2	121.1	4.4
100 or more employees	72	21.8	34.2	91.0	1,639.3	94.0	2,554.6	93.8
Products of purchased glass	1,337	100.0	41.3	100.0	1,483.7	100.0	2,976.5	100.0
Plants with average employment of --								
1 - 19 employees	950	71.1	5.2	12.6	139.9	9.4	283.6	9.5
20 - 99 employees	286	21.4	12.3	29.8	404.8	27.2	832.8	28.0
100 or more employees	101	7.6	23.8	57.6	939.0	63.3	1,860.0	62.5
Vitreous china food utensils	32	100.0	6.3	100.0	196.3	100.0	241.6	100.0
Plants with average employment of --								
1 - 19 employees	12	37.5	0.1	1.6	1.7	0.9	2.2	0.9
20 - 99 employees	9	28.1	0.7	11.1	13.5	6.9	19.1	7.9
100 or more employees	11	34.4	5.5	87.3	181.1	92.3	220.3	91.2
Fine earthenware food utensils	38	100.0	3.0	100.0	61.6	100.0	87.6	100.0
Plants with average employment of --								
1 - 19 employees	20	52.6	0.1	3.3	2.3	3.7	3.0	3.4
20 - 99 employees	9	23.7	0.4	13.3	9.0	14.6	12.3	14.0
100 or more employees	9	23.7	2.5	83.3	50.3	81.7	72.3	82.5

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
General Summary MC82-S-1 (Part 2)

GENERAL INDUSTRY STATISTICS

Location of the Industry

The most recent census of manufactures (1982) shows that New York, Pennsylvania and California are the leading centers for production of tabletop products.

Industry Statistics For Leading States

	All Plants		All Employees		Value Added By Manufacture*	
Industry	Total	With 20+ Employees	No. (Thous.)	%	Mil. $	%
Silverware & plated ware	208	55	9.1	100.0%	$ 311.9	100.0%
Leading states						
Connecticut	18	6	1.0	11.0	47.6	15.3
Massachusetts	29	14	2.6	28.6	82.2	26.4
New York	37	9	2.4	26.4	93.6	30.0
Pressed & blown glass	331	116	37.4	100.0	1,743.1	100.0
Leading states						
California	50	6	0.9	2.4	45.8	2.6
New York	22	6	1.0	2.7	57.6	3.3
Pennsylvania	28	16	5.7	15.2	251.5	14.4
West Virginia	27	23	4.6	12.2	146.9	8.4
Products of purchased glass	1,337	387	41.3	100.0	1,483.7	100.0
Leading states						
California	244	60	4.6	11.1	159.1	10.7
New Jersey	99	39	3.5	8.5	112.9	7.6
New York	126	29	4.1	9.9	202.3	13.6
Ohio	72	28	2.8	6.8	123.8	8.3
Pennsylvania	75	32	5.3	12.8	208.3	14.0
Vitreous china food utensils	32	20	6.3	100.0	196.3	100.0
Leading states						
California	6	4	0.4	6.3	8.3	4.2
Pennsylvania	5	5	1.5	23.8	42.5	21.7
Fine earthenware food utensils	38	18	3.0	100.0	61.6	100.0
Leading states						
California	12	7	1.1	36.7	30.4	49.4
Ohio	8	7	1.4	46.7	23.2	37.7

* For explanation of this value, see page 8. The total value of product shipments (all producers) by leading state is covered in the PRODUCT SHIPMENTS section.

Source: U.S. Bureau of the Census, 1982 Census of Manufactures.

PRODUCT SHIPMENTS

In contrast with "industry shipments" previously covered and defined on page 8, the value of product shipments covers the total value of shipments of specified classified items produced by all U.S. manufactures, regardless of the industry they are classified in based on their primary product. This includes products for the institutional market as well as for retail trade.

The following tables provide data on shipments for the years 1982-1985. The 1982 data, from the census of manufactures, are the most comprehensive, providing detail on some product categories not available for later years. Data for major tabletop classifications are available for 1984 from the annual survey of manufactures, while the most recent data on glassware shipments are contained in the 1985 Current Industrial Report.

Total table, kitchen, art, and novelty glassware shipments declined 5.4% in value in 1985 from the year before. There was a drop in the quantity shipped for nearly all glassware products measured that year, both machine-made and hand-made.

Quantity and Value of Shipments of Specified Glassware Products, 1984 and 1985

	1985		1984	
	Quantity	Value (Mil. $)	Quantity	Value (Mil. $)
Table, kitchen, art and novelty glassware, total (from produced and purchased glass)	--	$1,235.7	--	$1,306.9
Machine-made:				
Tumblers (mil. dozen)	42.0	183.6	47.6	206.7
Stemware (mil. dozen)	11.7	119.5	13.3	149.3
Tableware (mil. pieces)	115.1	122.3	205.6	243.5
Hand-made:				
Tumblers (mil. pieces)	0.7	1.6	1.1	1.5
Stemware (mil. dozen)	0.4	18.1	0.7	18.5
Tableware (mil. pieces)	3.9	18.2	3.9	16.5
Other handmade, table, kitchen, art, and novelty glassware	--	59.6	--	65.2

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Glassware MA32E(85)-1

PRODUCT SHIPMENTS

Value of Shipments By All U.S. Manufacturers, 1983 and 1984
(Millions of Dollars)

	1984	1983	% Change 1984/83
Silverware and plated ware, total	$432.1	$442.1	- 2.3%
Holloware	242.2	207.8	+16.6
Flatware	165.6	217.4	-23.8
Silverware and plated ware, n.s.k.	24.4	16.9	+44.4
Table, kitchen, art, and novelty glassware, made from produced glass	804.2	818.8	- 1.8
Vitreous china food utensils	217.1	201.6	+ 7.7
Fine earthenware food utensils	44.7	75.6	-40.9

n.s.k. not specified by kind (miscellaneous)

Source: U.S. Bureau of the Census,
1984 Annual Survey of Manufactures

Quantity and Value of Shipments of Specified Tabletop Products By All U.S. Manufacturers, 1982

	1982		1977	
	Quantity	Value (Mil. $)	Quantity	Value (Mil. $)
Silverware and plated ware, total	--	$489.3	--	$403.2
Holloware	--	208.2	--	175.2
Sterling silver	--	23.8	--	40.1
Electrosilver plated	--	82.6	--	83.1
Stainless steel	--	7.4	--	1.8
Pewter	--	28.8	--	19.6
Unplated and plated holloware of other metals	--	65.5	--	30.6
Holloware, n.s.k.				
Flatware (including all knives, spoons, and carving sets made wholly of metal)	--	266.1	--	193.2
Sterling silver (thous. doz.)	658.0	119.4	469.0	80.6
Electosilver plated:				
Noninstitutional (thous. doz.)	655.0	14.6	na	12.1
Stainless steel (thous. doz.)				
Institutional	na	100.0	15,706.0	78.3
Noninstitutional				
Unplated and plated flatware of other metals	na	12.4	na	7.1

(continued)

PRODUCT SHIPMENTS

Quantity and Value of Shipments of Specified Tabletop Products By All U.S. Manufacturers, 1982
(continued)

	1982		1977	
	Quantity	Value (Mil. $)	Quantity	Value (Mil. $)
Table, kitchen, art and novelty glassware:				
Machine made:				
Tumblers (mil. doz. pieces)	50.3	$205.3	72.8	$173.6
Stemware (mil. doz. pieces)	12.5	111.9	18.1	71.8
Tableware (mil. doz. pieces)	248.4	236.2	na	na
Ornamental, decorative, novelty glassware	--	163.0	--	85.6
Handmade:				
Tumblers (mil. pieces)	1.4	2.4	2.2	3.6
Stemware (mil. doz. pieces)	1.4	24.6	2.0	24.2
Tableware (mil. pieces)	4.2	14.5	6.1	15.2
Fine earthenware (semivitreous) food utensils:				
Household tableware (mil. doz. pieces)	9.5	70.9	12.2	77.1

na not available

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
MC82-I-32A, 32C, 39A

Concentration of Product Shipments

Share of Total Value of Shipments of Specified Products Accounted for by the Largest Companies: 1977, 1982

	Total Shipments (Mil. $)	Percent of Shipments Accounted for by the Largest Companies			
		Top 4	Top 8	Top 20	Top 50
Silverware and plated ware, total					
1982	$489.3	58%	72%	85%	93%
1977	403.2	51	67	82	91
Holloware					
1982	208.2	40	56	79	94
1977	175.2	44	64	90	100
Flatware					
1982	266.1	75	93	99	100
1977	193.2	68	87	98	100
Table, kitchen, art, and novelty glassware					
1982	813.0	84	92	98	100
1977	743.0	77	91	99	100

(continued)

PRODUCT SHIPMENTS

Concentration of Product Shipments

Share of Total Value of Shipments of Specified Products
Accounted for by the Largest Companies: 1977, 1982
(continued)

	Total Shipments (Mil. $)	Percent of Shipments Accounted for by the Largest Companies			
		Top 4	Top 8	Top 20	Top 50
Vitreous china and porcelain table and kitchen articles					
1982	$204.8	63%	87%	99%	100%
1977	140.9	66	92	99	100
Earthenware table and kitchen articles					
1982	91.3	53	71	95	100
1977	90.8	52	78	99	100

Source: U.S. Bureau of the Census,
1982 Census of Manufactures

Leading States

Share of Total Shipments of Specified Products Accounted For
By Producers In Leading States
(Value in millions of dollars)

	Value	Percent
Holloware	$208.2	100.0%
Connecticut	16.5	7.9
Massachusetts	78.9	37.9
New Jersey	12.0	5.8
New York	37.8	18.2
Ohio	3.7	1.8
Pennsylvania	8.9	4.3
Table, kitchen, art, and novelty glassware	813.0	100.0
Pennsylvania	107.9	13.3
West Virginia	189.4	23.3

Source: U.S. Bureau of the Census,
1982 Census of Manufactures.

PRODUCER PRICE TRENDS

Prices of silverware at the U.S. factory level in July 1986 averaged 1.8% below the level for the same month a year earlier. The biggest drop was in electrosilver plated products, down 4.5%. In contrast, prices for virtually all glassware products, as well as china, rose over July 1985 prices.

Producer prices averaged for all 1985 also show increases in the price levels for glassware and china. Table, kitchen, art, and novelty glassware rose 4.2% from the 1984 annual average, while prices for vitreous china food utensils gained 5.5%.

PRODUCER PRICE TRENDS

Producer (Factory) Price Index For Selected Tabletop Items

	July Averages			Annual Averages		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/84
Silverware, plated ware and stainless steel ware (6/85=100)	99.1	100.9	- 1.8%	na	na	--
Holloware	98.5	99.8	- 1.3	na	na	--
Sterling silver	98.6	99.0	- 0.4	na	na	--
Electrosilver plated	95.5	100.0	- 4.5	na	na	--
Pewter	102.5	100.0	+ 2.5	na	na	--
Flatware	98.7	102.1	- 3.3	102.1	na	--
Sterling silver	107.4	106.6	+ 0.8	106.7	na	--
Stainless steel	87.8	na	--	na	na	--
Pressed and blown glass (6/83=100)	108.9	107.0	+ 1.8	107.4	107.5	- 0.1%
Table, kitchen, art, and novelty glassware	108.5	106.9	+ 1.5	106.6	102.3	+ 4.2
Machine made:	107.4	105.7	+ 1.6	105.5	101.5	+ 3.9
Tumblers	109.1	109.0	+ 0.1	107.6	100.2	+ 7.4
Tableware	105.5	101.9	+ 3.5	102.7	101.4	+ 1.3
Ornamental, decorative and novelty glassware	107.0	106.3	+ 0.7	105.9	101.5	+ 4.3
Handmade:	121.8	121.4	+ 0.3	121.2	113.0	+ 7.3
Stemware	127.6	128.1	- 0.4	128.1	118.1	+ 8.5
Tableware	117.3	115.4	+ 1.6	115.4	106.8	+ 8.1
Ornamental, decorative and novelty glassware	117.1	116.2	+ 0.8	115.6	109.7	+ 5.4
Products of purchased glass (6/83=100)	108.3	104.3	+ 3.8	105.8	102.2	+ 3.5
Consumer glassware	117.1	111.5	+ 5.0	112.8	109.5	+ 3.0
Vitreous china food utensils (12/83=100)	112.9	108.7	+ 3.9	108.3	102.7	+ 5.5
Household tableware (1/84=100)	111.4	105.2	+ 5.9	104.8	na	--

na not available

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

Imports

Imports of tabletop merchandise to the U.S. were generally up in 1985. Even in those areas where there was a drop-off from the year before, imports were still far above their 1982 level. Tabletop imports dominate many segments of the American market and will continue to do so for the forseeable future.

U.S. imports of silverware and plated ware accounted for over one-third of domestic consumption in 1985. Pressure from imports is most intense at the low end of the market, especially in stainless steel flatware. The ability of foreign producers to buy steel at low prices gives them a competitive advantage over domestic producers. The leading foreign suppliers -- Japan, South Korea, and Taiwan -- account for nearly three-quarters of U.S. silverware and plated ware imports.

Earthenware imports made strong inroads into the U.S. market in 1985, up more than 23%. Major suppliers were Japan, the United Kingdom and South Korea. The domestic industry has been having difficulty offsetting the price differences between imported and U.S.-made earthenware. A good deal of domestic earthenware production is at the low end of the market.

Imports (continued)

Japan accounted for nearly half of china imports, which rose 2.3% overall in 1985. In particular, it dominated nonbone china tableware classifications. Mass dinnerware has, for the most part, been sourced in the Far East, especially Japan. However, with the fluctuation of the yen rate (during the past year, the dollar has lost about 40% of its buying power there), manufacturers are looking to China. As the quality of its products improve, China is making its mark in promotional stoneware and porcelain, taking business away from Korea and Taiwan. The United Kingdom, with resources such as Wedgwood and Royal Doulton, is another major supplier of chinaware. The United Kingdom is also an important supplier of glassware, as are France and West Germany. Ireland, led by Waterford, leads in high-end glassware imports to the U.S.

Quantity and Value of Imports to U.S. of Tabletop Items, 1982, 1984, 1985

Earthenware	Net Quality (000)*			
	1985	1984	1982	% Change 1985/84
Earthenware or stoneware, coarse-grain	180	142	93	+ 26.2%
Earthenware, fine-grain, red body household ware	88	94	155	- 6.5
Earthenware, fine-grain, in spec. sets, not over $38 each	2,919	1,932	911	+ 51.1
Earthenware, fine-grain, in spec. sets, over $38 each	22,283	17,722	14,223	+ 25.7
Steins with permanently attached pewter lids	38	19	14	+ 96.3
Mugs and other steins	14,620	11,931	7,198	+ 22.5
Earthenware candy boxes, punch bowls, dishes, servers, etc.	1,438	1,605	766	- 10.4
Earthenware, fine-grain, cups $5.25+, other products over $3	742	828	629	- 10.4
Articles of fine-grained earthenware	6,665	5,392	2,963	+ 23.6
Total, earthenware	48,973	39,656	26,952	+ 23.5

Earthenware	C.I.F. Value (Thous. $)				
	1985	1984	1982	% Change 1985/84	Leading Exporter 1985**
Earthenware or stoneware, coarse-grain	$1,208	$1,251	$ 633	- 3.4%	--
Earthenware, fine-grain, red body household ware	617	848	940	- 27.2	--
Earthenware, fine-grain, in spec. sets, not over $38 each	12,093	9,398	5,369	+ 28.7	Japan
Earthenware, fine-grain, in spec. sets, over $38 each	168,153	134,501	116,175	+ 25.0	Japan
Steins with permanently attached pewter lids	1,389	1,273	1,124	+ 9.1	W.Germany
Mugs and other steins	86,042	81,299	43,564	+ 5.8	Japan
Earthenware candy boxes, punch bowls, dishes, servers, etc.	9,646	11,868	5,330	- 18.7	Japan
Earthenware, fine-grain, cups $5.25+, other products over $3	15,565	16,137	9,984	- 3.5	Japan
Articles of fine-grained earthenware	50,155	51,956	29,123	- 3.5	Japan
Total earthenware	344,868	308,531	212,242	+ 11.8	

(continued)

Quantity and Value of Imports to U.S. of Tabletop Items, 1982, 1984, 1985
(continued)

	Net Quality (000)*			
China	1985	1984	1982	% Change 1985/84
Bone china	970	1,320	666	- 26.5%
Chinaware, nonbone in specified sets valued not over $56	4,680	4,297	3,164	+ 8.9
Chinaware, nonbone in specified sets, valued over $56 set	7,215	6,510	5,189	+ 10.8
Steins with permanently attached pewter lids, not in spec. sets	5	6	1	- 15.7
Mugs and other steins, not in specified sets	2,506	2,263	1,211	+ 10.7
Candy boxes, decanters, bowls, servers, not in specified sets	507	708	496	- 28.4
Nonbone china tableware - high value	680	970	658	- 29.9
Nonbone china tableware - medium value	4,395	4,419	4,505	- 0.5
Total, china	20,958	20,493	15,891	+ 2.3

	C.I.F. Value (Thous. $)				
China	1985	1984	1982	% Change 1985/84	Leading Exporter 1985**
Bone china	$ 49,008	$40,972	$29,127	+ 19.6%	United Kingdom
Chinaware, nonbone in specified sets valued not over $56	18,276	22,676	15,734	- 19.4	China
Chinaware, nonbone in specified sets, valued over $56 set	96,723	100,503	79,855	- 3.8	Japan
Steins with permanently attached pewter lids, not in spec. sets	291	317	285	- 8.2	--
Mugs and other steins, not in specified sets	17,722	16,500	8,266	+ 7.4	Japan
Candy boxes, decanters, bowls, servers, not in specified sets	3,983	5,611	2,941	- 29.0	Japan
Nonbone china tableware--high value	16,207	18,875	14,453	- 14.1	Japan
Nonbone china tableware--medium value	25,458	28,604	25,379	- 11.0	Japan
Total, china	227,668	234,058	176,040	- 2.7	

(continued)

Quantity and Value of Imports to U.S. of Tabletop Items, 1982, 1984, 1985
(continued)

Glassware	Net Quantity (000)*			
	1985	1984	1982	% Change 1985/84
Tumblers, goblets, stemware, tableware:				
Not over $1 each	13,512	6,851	5,033	+97.2%
$1 to $3 each	19,199	21,395	13,950	-10.3
Over $3 but not over $5 each	2,139	2,225	1,357	- 3.9
Over $5 each	4,424	4,637	3,337	- 4.6
Colored, with bubbles, seeds or stones throughout	4,697	3,865	5,008	+21.5
Colored, without bubbles, seeds or stones	1,292	843	640	+53.3
Not over $.30 each	29,139	27,597	8,348	+ 5.6
Over $.30 but not over $3 each	62,296	73,831	69,211	-15.6
Cut or engraved-$3 to $5 each	495	407	293	+21.4
Cut or engraved - over $5 each	267	315	157	-15.3
Not cut or engraved - over $3 but not over $5 each	933	925	688	+ 0.9
Not cut or engraved - over $5 each	230	131	131	+75.7
Total, tumblers, goblets, etc.	138,622	143,021	108,153	- 3.1

Glassware	C.I.F. Value (Thous. $)				
	1985	1984	1982	% Change 1985/84	Leading Exporter 1985**
Tumblers, goblets, stemware, tableware:					
Not over $1 each	$ 10,594	$ 4,683	$ 3,580	+126.2%	France
$1 to $3 each	30,823	32,626	22,935	- 5.5	France
Over $3 but not over $5 each	8,714	8,983	5,433	- 3.0	W.Germany
Over $5 each	60,487	61,207	44,956	- 1.2	Ireland
Colored, with bubbles, seeds or stones throughout	2,473	2,141	2,679	+15.5	--
Colored, without bubbles, seeds or stones	575	401	396	+43.4	--
Not over $.30 each	4,910	4,342	1,523	+13.1	--
Over $.30 but not over $3 each	43,161	47,569	44,065	- 9.3	France
Cut or engraved-$3 to $5 each	2,037	1,708	1,239	+19.3	--
Cut or engraved - over $5 each	2,056	2,469	1,307	-16.7	--
Not cut or engraved - over $3 but not over $5 each	3,762	3,577	2,563	+ 5.2	W.Germany
Not cut or engraved - over $5 each	2,011	1,229	1,193	+63.6	--
Total, tumblers, goblets, etc.	171,603	170,934	131,869	+ 0.4	

(Glassware continued)

Quantity and Value of Imports to U.S. of Tabletop Items, 1982, 1984, 1985
(continued)

	Net Quality (000)*			
Glassware	1985	1984	1982	% Change 1985/84
Glassware nspf:				
Valued not over $1 each	8,574	5,781	7,710	+ 48.3%
From $1 to $3 each	7,371	5,085	5,658	+ 44.9
Over $3 but not over $5 each	2,683	2,730	1,227	- 1.8
Over $5 each	4,306	3,950	2,040	+ 9.0
With metal flecks embedded, not over $1 each	787	425	301	+ 84.9
With metal flecks embedded, over $1 each	364	257	113	+ 41.8
Pressed and toughened (tempered)	46,709	51,720	57,347	- 9.7
Not over $.30 each	24,811	22,116	9,783	+ 12.2
Over $.30 but not over $3 each	38,498	38,811	22,643	- 0.8
Cut or engraved - valued over $5 each	400	266	188	+ 50.4
Not cut or engraved - over $3 but not over $5 each	1,619	1,534	1,422	+ 5.5
Not cut or engraved - over $5 each	1,255	1,377	804	- 8.9
Total glassware nspf	137,374	134,053	109,235	+ 2.5
Total, glassware	275,996	277,074	217,388	- 0.4

	C.I.F. Value (Thous. $)				
Glassware	1985	1984	1982	% Change 1985/84	Leading Exporter 1985**
Glassware nspf:					
Valued not over $1 each	$5,125	$3,559	$3,098	+44.0%	Yugoslavia
From $1 to $3 each	14,729	9,876	10,395	+44.9	W. Germany
Over $3 but not over $5 each	11,165	11,053	4,965	+ 1.0	W. Germany
Over $5 each	63,722	57,894	31,676	+10.1	France
With metal flecks embedded, not over $1 each	299	181	150	+65.2	--
With metal flecks embedded, over $1 each	2,101	1,197	518	+75.5	Italy
Pressed and toughened (tempered)	23,510	24,260	27,295	- 3.1	France
Not over $.30 each	4,110	3,642	1,467	+12.9	Taiwan
Over $.30 but not over $3 each	33,358	32,432	20,010	+ 2.9	Taiwan
Cut or engraved - valued over $5 each	3,924	3,071	2,225	+27.8	Romania
Not cut or engraved - over $3 but not over $5 each	6,692	6,293	5,715	+ 6.3	Taiwan
Not cut or engraved - over $5 each	16,199	17,614	10,733	- 8.0	Italy
Total glassware nspf	184,934	171,072	109,235	+ 8.1	
Total, glassware	356,537	342,006	241,104	+ 4.2	

(continued)

Quantity and Value of Imports to U.S. of Tabletop Items, 1982, 1984, 1985

(continued)

	Net Quality (000)*			
Flatware	1985	1984	1982	% Change 1985/84
Spoons:				
With sterling silver handles	180	80	25	+124.9%
With silver plated handles	4,664	4,065	2,319	+ 14.8
With stainless steel handles	245,371	247,925	193,202	- 1.0
With non-metal handles or handles of metals other than stainless steel	15,289	18,756	15,109	- 18.5
Spoons, nspf	9,227	6,609	3,603	+ 39.6
Total, spoons	274,731	277,435	214,257	- 1.0
Forks:				
With silver handles	48	54	24	- 10.7
With silver plated handles	3,309	2,241	621	+ 47.7
With stainless steel handles containing no nickel and not over 10% manganese	154,611	155,678	122,963	- 0.7
With stainless steel handles containing nickel or over 10% manganese	5,699	13,047	7,591	- 56.3
With rubber or plastic handles	13,659	12,472	9,962	+ 9.5
Forks, nspf	5,296	7,850	6,923	- 32.5
Total, forks	182,623	191,342	148,083	- 4.6
Knives:				
With silver handles	38	18	16	+110.2
With silver plated handles	1,798	1,510	949	+ 19.1
With stainless steel handles containing nickel and not over 10% manganese	87,621	86,982	72,957	+ 0.7
With stainless steel handles containing nickel or over 10% manganese	2,699	4,475	2,958	- 39.7
With handles of animal, horn, bone, etc.	17	47	37	- 63.7
With handles of rubber or plastic	14,276	9,690	3,059	+ 47.3
Knives, nspf	37,817	36,794	26,287	+ 2.8
Total, knives	144,267	139,516	106,263	+ 3.4
Sets:				
Sets with spoons, forks & knives	298,234	371,712	209,861	- 19.8
Total, flatware	899,855	980,005	678,464	- 8.2

(Flatware continued)

Quantity and Value of Imports to U.S. of Tabletop Items, 1982, 1984, 1985
(continued)

	C.I.F. Value (Thous. $)				
Flatware	1985	1984	1982	% Change 1985/84	Leading Exporter 1985**
Spoons:					
With sterling silver handles	$1,040	$1,055	$ 729	- 1.4%	--
With silver plated handles	3,927	4,005	2,302	- 2.0	Taiwan
With stainless steel handles	31,846	34,209	29,407	- 6.9	Japan
With non-metal handles or handles of metals other than stainless steel	6,258	4,813	4,047	+ 30.0	Japan
Spoons, nspf	2,758	2,620	1,707	+ 5.3	--
Total, spoons	45,829	46,702	38,192	- 1.9	
Forks:					
With silver handles	924	813	721	+ 13.7	--
With silver plated handles	2,370	2,181	914	+ 8.7	Taiwan
With stainless steel handles containing no nickel and not over 10% manganese	19,320	20,384	15,634	- 5.2	S. Korea
With stainless steel handles containing nickel or over 10% manganese	3,078	5,033	4,019	- 38.8	Japan
With rubber or plastic handles	1,829	1,607	1,047	+ 13.8	--
Forks, nspf	2,360	2,376	2,201	- 0.7	Japan
Total, forks	29,881	32,394	24,536	- 7.8	
Knives:					
With silver handles	704	438	388	+ 45.8	--
With silver plated handles	2,566	2,306	1,639	+ 11.3	Taiwan
With stainless steel handles containing nickel and not over 10% manganese	21,966	22,400	19,857	- 1.9	S. Korea
With stainless steel handles containing nickel or over 10% manganese	3,925	5,134	3,508	- 23.5	Japan
With handles of animal, horn, bone, etc.	87	111	167	- 21.6	--
With handles of rubber or plastic	5,434	3,652	2,037	+ 48.8	Taiwan
Knives, nspf	12,687	12,016	8,167	+ 5.6	Japan
Total, knives	47,369	46,102	35,763	+ 2.7	
Sets:					
Sets with spoons, forks & knives	80,486	94,060	58,769	- 14.4	Japan
Total, flatware	203,565	219,258	157,260	- 7.2	

nspf U.S. Census Bureau abbreviation denoting data that does not fall into any specified classifications.

* Units of quantity are as follows:

Earthenware -- dozens of pieces	Glassware -- number of pieces
China -- dozens of pieces	Flatware -- number of pieces

**Leading exporting nations were only listed for those commodities where there was a clear leader.

Source: U.S. Bureau of the Census,
U.S. Imports For Consumption, FT246, Annual 1982, 1984, 1985.

FOREIGN TRADE

Exports

U.S. exports in reported categories of tableware/flatware generally declined sharply in value in 1985 compared with 1984, but some products did better in the first quarter of 1986. As the value of the U.S. dollar declines, U.S. exports of tabletop products are expected to show growth. Canada is among major foreign markets for U.S. production of earthenware, glassware and silverware. Japan and West Germany are also important markets for silverware. Leading export destinations for china are the United Kingdom and Australia.

U.S. Exports of Tableware and Flatware, First Quarter 1986

	First Quarter			Annual		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/84
Fine earthenware food utensils:						
Quantity (thous. doz.)	67	113	-40.7%	341	639	-46.6%
Value (thous. $)	$ 571	$ 404	+41.3	$2,189	$3,428	-36.1
Vitreous china food utensils:						
Quantity (thous. doz.)	378	495	-23.6	1,629	2,343	-30.5
Value (thous. $)	$2,780	$3,865	-28.1	$13,565	$19,353	-29.9
Table flatware, precious metals:						
Quantity (pieces)	9,484	30,455	-68.9	51,221	65,431	-21.7
Value (thous. $)	$ 139	$ 398	-65.1	$ 977	$ 1,290	-24.3
Table flatware, stainless steel:						
Quantity (pieces)	155,321	155,710	- 0.2	657,603	4,582,968	-85.7
Value (thous. $)	$ 435	$ 280	+55.4	$ 1,313	$ 36,331	-96.4

Source: U.S. International Trade Commission: U.S. Trade Shifts in Selected Commodity Areas (First Quarter 1986)

ADVERTISING

Leading Advertisers

Corning Glass Works was the leading purchaser of magazine advertising space for the first half of 1986, spending nearly $3.5 million through June 30. For the same period last year, it spent just $161,935. The bulk of its advertising expenditures were to promote its Corelle dinnerware, with the balance going toward products from its Steuben Glass division.

The second leading advertiser in the industry was Waterford Crystal with expenditures totaling $2.2 million, a gain of 17% from the first half of 1985. Lenox advertising was up 15.2% for the period to $1.5 million. 10 of the 13 leading dinnerware/glassware advertisers spent more during the first six months of 1986 than the comparable 1985 period, the exceptions being Orrefors, Wedgwood, and Pfaltzgraff.

The leading flatware advertisers were evenly split between those that have spent more than in 1985 and those that have spent less. Oneida's expenditures are down 45% thus far this year to just over $1 million. Goebel and Lladro (Weil Ceramic) figurines led in advertising for that classification, with gains of 42% and 89%, respectively, over last year.

Leading Advertisers (continued)

Through July 1986, purchases of magazine space by all dinnerware/glassware/pottery advertisers was up 31.7% over the comparable 1985 period. Purchases by all flatware advertisers was down 27.6%, while advertising of figurines shot up 70.5%.

Leading Tabletop and Giftware Advertisers in Consumer Magazine Spending for Space: First Half 1985 and 1986

	First Half 1986	First Half 1985
Dinnerware/Glassware/Pottery		
Corning Glass Works	$3,497,158	$ 161,935
Waterford Crystal	2,198,186	1,874,846
Lenox China & Crystal	1,545,075	1,341,784
Durand Imported Crystal	331,928	193,020
Baccarat Crystal	310,327	227,811
Orrefors Crystal	303,302	311,251
Russ Berrie Mugs	255,810	--
Gorham China & Crystal	254,229	124,751
Noritake China, Crystal, Tableware	237,385	206,474
Lalique Crystal	235,961	199,070
Wedgwood China & Crystal	171,795	309,823
Royal Copenhagen Porcelain	171,275	100,106
Pfaltzgraff Stoneware	158,521	201,759
Flatware		
Oneida	1,022,211	1,871,356
Gorham	191,505	207,950
Sterling Silversmiths Guild	178,459	--
Christofle	157,100	177,736
Wallace-International	139,634	--
Kirk Stieff	133,651	1,932
Yamazaki	75,630	51,820
Towle	75,214	191,278
Reed & Barton	74,545	223,327
Figurines/Decorative Assessories		
Goebel Figurines	298,585	210,173
Lladro Figurines (Weil Ceramic & Glass)	296,597	156,615
Waterford Crystal Lamps	177,478	17,450
Boehm Porcelain Reproductions	174,130	45,075
J. Seward Johnson Sculptures	50,774	31,065
Ebeling & Reuss Figurines	46,612	--
Gorham Porcelain Reproductions	14,470	--

Source: Publishers Information Bureau, Leading National Advertisers

Leading Advertisers (continued)

According to the 1986 edition of Ads Forecasts (Advertising Age, September 15, 1986), total advertising dollars for the silverware/flatware industry represented 2.5% of industry sales in 1985. The study, an annual report on advertising expenditures, is produced by Pansophic Systems (it was formerly produced by Schoenfeld & Associates). Ad dollars in the industry represented 9.8% of total gross margins (net sales less cost of goods sold) and ad expenditures grew by 2.0% in 1985. Spending includes both media spending as well as collateral literature and production.

AT THE RETAIL LEVEL

CONSUMER EXPENDITURES

The nation's consumers spent an estimated total of $12.8 billion for china, glassware, tableware, and utensils in 1985. This was nearly 5% above the total of $12.2 billion reported by the Bureau of Economic Analysis for 1984. The 1984 total was about 9% higher than in 1983.

On a constant dollar basis, eliminating the effects of inflation, spending in 1985 gained more than 4% over 1984. These figures cover the value at retail of all goods (new and used) reaching the consumer through any channel, including retail outlets, premiums, direct sale by manufacturers and wholesalers, flea markets, fairs, etc.

Personal Consumption Expenditures For China, Glassware, Tableware and Utensils, 1982-1985
(Billions of dollars)

	1985	1984	1983	1982
Current Dollars	$12.8	$12.2	$11.2	$10.4
Constant (1982) Dollars	12.5	12.0	11.0	10.4

Source: U.S. Department of Commerce,
Bureau of Economic Analysis

The above consumption figures, by definition, include kitchenware products, which account for a significant portion of the total. Modern Bride magazine estimates that retail sales solely of tableware and table accessory products was nearly $5.6 billion in 1985. The 1982 census of retail trade, compiled by the U.S. Census Bureau, places retail sales of dinnerware, glassware, tableware and giftware in specified retail outlets with payroll at $4.3 billion for the year.

A retail preference for formal, traditional designs in tabletop has highlighted an upturn in business for a number of stores, particularly in china, silver holloware and high-end crystal. Increased consumer interest in fine, better quality classic designs has gone hand-in-hand with narrower, cleaner stock positions; better looking retail presentations; and price realigning by manufacturers in generating stronger retail sales. The emphasis on promotional goods that was prevalent in the market last season has clearly lost its luster among many retailers.

RETAIL SALES BY PRODUCT

In late 1985, the U.S. Bureau of the Census released reports on retail sales of specific major merchandise categories by type of retail outlet, based on the complete census of retail trade covering operations in 1982.

The following table covers the sales share in reported tabletop and giftware classifications held by types of retail outlets. The census of retail trade, compiled every five years by the Bureau of the Census, is the only official data compiled on merchandise line sales by type of retail outlet. The following table covers outlet types for which tabletop/giftware sales were specifically reported. Not included are mail order (catalog headquarter) sales, supermarket sales, etc. Mail order catalogs account for a significant, but undetermined, share of sales.

Tabletop and Giftware Sales by Specified Outlet Type, 1982
(In retail establishments with payroll)

	No. of Establishments	Sales by Outlet Type	
		Thous. $	Percent
Tabletop and giftware, reported total	--	$4,315,115	100.0%
Department stores*, total	--	2,652,928	61.5
Dinnerware, glassware, tableware, giftware	8,750	1,465,680	
Decorative accessories	8,962	1,187,248	
Variety stores, total	--	256,098	5.9
Dinnerware, glassware, tableware giftware	6,900	120,668	
Decorative accessories	7,397	135,430	
Drapery, curtain, and upholstery stores, total	--	14,879	0.4
Dinnerware, glassware, tableware, giftware	73	5,416	
Decorative accessories	409	9,463	
Jewelry stores, total	--	292,662	6.8
China and glassware	4,663	140,020	
Flatware and holloware	5,999	152,642	
Gift, novelty and souvenir shops:			
Giftware, glassware and novelties	12,968	1,037,576	24.0
Luggage and leather goods stores:			
Giftware, glassware and novelties	284	13,124	0.3
Book stores:			
Giftware, glassware and novelties	718	22,499	0.5
Stationery stores:			
Giftware, glassware and novelties	584	25,349	0.6

* Includes discount department stores as well as traditional department stores. Also includes department stores operated by national chains, such as Sears, Ward, Penney.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade

RETAIL SALES BY STORE TYPE

Department Stores

According to the 1982 census of retail trade, U.S. Bureau of the Census, department stores accounted for 61.5% of total retail sales of tabletop and giftware products by major store types that year. In 1982, there were 9,981 department stores operating in the U.S. Of these, 8,750 (88%) reported sales of dinnerware, glassware, tableware, and giftware. 8,962 stores (almost 90%) had sales of decorative accessories.

Dinnerware, glassware, tableware, and giftware accounted for 1.5% of all department store sales. Decorative accessories were 1.2% of total department store sales.

Typical operating ratios of tabletop departments within department stores are compiled annually by the National Retail Merchants Association. The following table shows median figures for 1984.

Merchandising & Operating Results of Tabletop Departments
In Department Stores With Sales Over $1 Million
(Median Results)

	China (60)*	Glassware (60)*	Silverware (43)*	Gift Shop (48)*
Net sales, % change from last year	1.3	10.4	5.0	8.3
Sales, % to total store	1.0	0.6	0.7	0.8
Net sales, % of merchandise division **	12.1	8.2	8.0	8.7
$ sales per sq. ft. of selling space (main or largest unit)	$113.8	$ 89.2	$121.1	$44.1
Cumulative markon, %	46.3	50.0	43.9	52.6
Gross margin, % of net sales (incl. cash discounts)	41.9	43.9	40.7	44.9
Markdown, retail, % of sales	13.3	11.7	12.0	17.8
Number of stock turns (times)	1.2	1.2	1.3	1.5
Sales promotion, % of net sales	5.7	5.7	5.9	4.1

* Number in parenthesis refers to the number of reporting companies.

**Merchandise division is Home Furnishings: Furniture & Decorative Accessories.

Source: National Retail Merchants Association
Merchandising & Operating Results of 1984
(1985 edition)

The expense of operating a tabletop area has precluded many department stores from making a profit on it. Low profit margins have prompted some stores to reduce the amount of space they have alloted to this merchandise.

Among stores that have, nevertheless, done very well with their tabletop departments is Bloomingdale's. Its renovated department generated $20 million in tabletop business, with the bridal registry accounting for 35% of that figure. The store highlights merchandise from producers that have limited distribution and maintain their pricing structure. Producers are expected to deliver on time and provide extensive customer service.

RETAIL SALES BY STORE TYPE

Gift, Novelty, and Souvenir Shops

According to the 1982 census of retail trade, there were 22,311 gift, novelty, and souvenir shops in operation that year, with sales totaling $4.6 billion. 12,968 of these establishments (58.1%) reported sales of giftware, glassware, and novelties. Sales of this merchandise was just over $1.0 billion, representing 22.5% of all sales in the store type.

RETAIL SALES: THE BRIDAL MARKET

The number of marriages in 1985 (2,425,000) represented the fourth largest annual total in U.S. history. While the marriage rate has been falling, the bridal market represents the single most important source of tabletop/giftware business.

Number of Marriages By Region, 1985

	Number	% of U.S. Total
U.S. Total	2,436,796*	100.0%
South Atlantic	443,595	18.2
East North Central	365,658	15.0
West South Central	319,824	13.1
Middle Atlantic	315.466	12.9
Pacific	314,542	12.9
Mountain	233,165	9.6
East South Central	172,440	7.1
West North Central	157,251	6.5
New England	114,855	4.7

Note: Data are by state of occurrence rather than by state of residence.

* Data includes marriages reported or marriage licenses issued.

Though June continues to be the most popular month for marriages, there is more balance throughout the rest of the year than there once was, providing year-round opportunities for retailers.

Number of Marriages By Month, 1985

	Number	% of U.S. Total
U.S. Total	2,425,000	100.0%
January	129,000	5.3
February	146,000	6.0
March	157,000	6.5
April	174,000	7.2
May	238,000	9.8
June	280,000	11.5
July	235,000	9.7
August	255,000	10.5
September	235,000	9.7
October	206,000	8.5
November	182,000	7.5
December	187,000	7.7

Source: U. S. Department of Health & Human Services,
Monthly Vital Statistics Report, September 1986

RETAIL SALES: THE BRIDAL MARKET

The wedding gift market constitutes a major segment of total retail business in tabletop and giftwares. Through the operation of bridal registry services, brides are able to record their preferences on brands, patterns, etc., and retailers are able to maintain a strong link with the market, from trousseaux purchases through the equipping of a new home.

Men and women are delaying marriage to a large extent until they establish careers. This has resulted in more discretionary income and established tastes when they finally do marry. Those who might already have one or two sets of casual dinnerware used in their own apartments are ready and able to trade up to fine china and crystal.

The increase in the number of "encore" weddings (now about 35% of all marriages) also represents sales opportunities. It is now socially acceptable for these couples to join bridal registries and second, even third weddings are no longer the sedate affairs they once were. The brides are more sophisticated and not as willing to settle for basics.

Modern Bride magazine has compiled estimates on the share of total sales of specific products accounted for the bridal market, including both gifts and items purchased by the newlyweds. In the case of sterling silver tableware, pewter and fine china, upwards of half the market was concentrated in bridal business.

Estimated Bridal Market Share of Total Tableware and Table Accessory Sales, 1985

Tableware	Total Bridal Market Sales (Mil. $)	Total National Retail Sales (Mil. $)	Bridal Market Share of National Sales
Sterling silver flatware	$ 168.2	$ 348.0	48.3%
Silver plated flatware	44.6	101.0	44.2
Pewter flatware	5.7	24.8	23.0
Stainless steel flatware	71.2	708.3	10.1
Fine crystal stemware/glassware	144.0	352.0	40.9
Casual glassware	45.0	553.0	8.1
Barware	26.4	354.0	7.5
Fine china dinnerware	249.3	503.0	49.6
Casual dinnerware	145.8	665.6	21.9
Other tableware	21.8	--	--
Total	922.0	3,609.7	25.5
Table Accessories			
Sterling silver table accessories	94.6	174.0	54.4
Silver plated table flatware	77.2	402.0	19.2
Pewter table flatware	34.3	57.6	59.5
Stainless steel table accessories	26.6	70.8	37.6
Fine crystal table accessories	104.5	226.0	46.2
Casual glass table accessories	45.7	558.0	8.2
Fine china table dinnerware	89.8	302.0	29.7
Casual china table accessories	40.1	176.0	22.8
Other table accessories	33.1	--	--
Total	545.9	1,996.4	27.3

Source: Modern Bride Magazine, A Summary of Bridal Market Retail Expenditures (1985)

RETAIL SALES: THE BRIDAL MARKET

The trend toward more elegant and formal weddings is reflected in the more traditional tabletop gifts that couples are receiving and buying for themselves. They're going for classic styles in silver and crystal by Lenox and Waterford. In dinnerware, Noritake -- which has made the bridal market a top priority for years -- has maintained its consistency in design despite the fashion-forward products of other companies.

Sales of sterling are down because of the price, but what is being sold is in very traditional patterns. People are investing in designs that they feel will still be fashionable years from now. Brides do not automatically pick sterling as they once might have. A bride may specify a certain kind of serving piece, for example, and give the donor the choice of sterling or crystal.

The high cost of silver has also stimulated sales of silverplated and stainless steel flatware. If a bride does not want to register for sterling, she may register for two different stainless patterns, a casual pattern for every day and a more elaborate one for formal occasions.

Estimated First Marriage and Remarriage Share of Tableware and Table Accessory Sales

	Total Bridal Market Sales (Mil. $)	Bridal Market	
Tableware		First Marriage (Mil. $)	Remarriage (Mil. $)
Sterling silver flatware	$ 168.2	$ 131.4	$ 36.8
Silver plated flatware	44.6	37.4	7.2
Pewter flatware	5.7	5.7	--
Stainless steel flatware	71.2	63.7	7.5
Fine crystal stemware/glassware	144.0	113.7	30.3
Casual glassware	45.0	38.0	7.0
Barware	26.4	21.3	5.1
Fine china dinnerware	249.3	194.4	54.9
Casual dinnerware	145.8	124.8	21.0
Other tableware	21.8	16.0	5.8
Total	922.0	746.4	175.6
Table Accessories			
Sterling silver table accessories	94.6	60.1	34.5
Silver plated table flatware	77.2	58.4	18.8
Pewter table flatware	34.3	32.0	2.3
Stainless steel table accessories	26.6	25.4	1.2
Fine crystal table accessories	104.5	74.9	29.6
Casual glass table accessories	45.7	37.3	8.4
Fine china table dinnerware	89.8	64.7	25.1
Casual china table accessories	40.1	36.8	3.3
Other table accessories	33.1	24.8	8.3
Total	545.9	414.4	131.5

Source: Modern Bride Magazine, A Summary of Bridal Market Retail Expenditures (1985)

BUYING HABITS

The following list reflects the percentage of the U.S. adult population that purchased at least one of the items in each category during the past 12 months based on over 14,000 diaries analyzed by the Simmons Market Research Bureau. This list does not reflect multiple purchases.

Percent of All Adults Who Bought At Least One Unit During the Past Year

Merchandise	Percent
Glassware (not crystal)	6.1%
Stainless steel flatware	5.8
Crystalware	4.8
Stoneware dinnerware	4.2
Casual/everyday dinnerware	3.2
Fine china dinnerware	2.4
Sterling silver flatware	1.6
Silverplated flatware	1.0

Source: Simmons Market Research Bureau, 1985
(1987 Newspaper Advertising Planbook)

Glassware

In recent MarkeTrends research from Chain Store Age/Leo J. Shapiro & Associates, shoppers expressed a greater concern for glassware prices than in the past, with discounters gaining favor as the outlet these customers think of when they plan to purchase glassware. In the research, 38.4% indicated plans to buy at a discount store. Department stores were cited as the next most popular outlet, followed by the Big 3 (Sears, J.C. Penney and Montgomery Ward). Most households questioned by Chain Store Age (66.7%) preferred to buy individual glassware pieces rather than sets.

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now -- 1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE: Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well as information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

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FACT FILE

Market Research Division
Fairchild Publications, New York

Department Store Sales

FAIRCHILD FACT FILE

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INTRODUCTION

The information in this Fact File is in four sections. Section I covers sales of department stores, and of large apparel specialty stores and the number of stores included in the sales figures. Retailers are listed by headquarter location (region, state and city). Sales figures are for the latest annual period available -- for the most part 1985 -- based on published reports or the best available trade sources, including the Fairchild trade press, Dun & Bradstreet, the National Retail Merchants Association and other trade sources.

Section II lists leading traditional department stores (buying headquarters) and the total sales volume accounted for by each operation, including all those with a total sales volume of $50 million or more. Section III is a list of the major general merchandise/apparel retail conglomerates with their sales. Emphasis is on traditional store operations, but a few large discounters and off-price operations have been included. Section IV covers a list of the major operators of conglomerates of stores operating under different names, including department and specialty stores.

The Standard Industrial Classification (SIC) Manual defines department stores as establishments normally employing 25 people or more, having combined sales of apparel and soft goods amounting to 20 percent or more of the total sales, and selling each of the following lines of merchandise:

1. Furniture, home furnishings, appliances, radios and TV sets
2. A general line of apparel for the family
3. Household linens and dry goods

To qualify as a department store, sales of each of the above listed lines must be less than 80 percent of the total sales. An establishment with total sales of $10 million or more is classified as a department store even if sales of one of the merchandise lines listed above exceeds the maximum percent of total sales, provided that the combined sales of the other two groups are $1 million or more. Relatively few stores are included in this classification as a result of this special rule and most of those which are would otherwise have been classified in the apparel group.

To an increasing extent, department stores are diversifying their activities, opening specialty store units, off-price outlets, etc., or becoming part of conglomerate operations active in a number of different types of businesses. This has, of course, added to the difficulty of isolating department store volume from consolidated sales data.

Stores are also expanding their operations beyond the trading area of the headquarter store. The sales attributed to headquarter locations may cover activities removed from the specific city or trading area in which they are listed in the Fact File. Separate data on branch store operations is included only where available.

NOTE: This report includes only those stores for which sales data, believed to be reasonably accurate, can be reported. The current sales estimates may differ markedly from estimates reported for previous years. This may be due, however, not to an actual gain or loss in volume of the magnitude indicated, but to differences in the compilation of estimates. Since revisions in earlier estimates may be in order, year-to-year comparisons in sales figures are not recommended.

Audrey S. Balchen, Director
Fairchild Market Research Division

I. SUMMARY OF AVAILABLE SALES FIGURES
DEPARTMENT STORES & LEADING APPAREL SPECIALTY STORES, 1985
BY REGION & CITY (Headquarter Location)

NORTHEAST	APPROX. SALES (Millions of $)
CONNECTICUT	
Bridgeport	
Countdown of Connecticut (20 specialty stores)	$ 13.0
Read's Department Stores (Allied Stores, New York, N.Y.) (6 stores: Conn. 5, N.Y. 1)	107.6
Enfield	
Casual Corner (U.S. Shoe Corp., Cincinnati, Ohio) (624 specialty stores)	515.0
Hartford	
G. Fox & Co. (May Dept. Stores, St. Louis, Mo.) (8 stores: Conn. 6, Mass. 1, R.I. 1)	219.1
(A Danbury, Conn. store is to be opened before the end of 1986)	
Sage-Allen & Co. (13 jr. dept. stores: Conn. 12, Mass. 1)	71.1
Middletown	
Bob's (4 stores)	29.0
New Britain	
Weathervane (63 stores)	40.0
New Haven	
J. Press (3 spec.stores)(Acquired in 1986 by Kashiyama USA, Inc.)	5.0
MAINE	
Damariscotta	
R.H. Remy, Inc. (13 jr. dept. stores in Maine)	10.0
Freeport	
L.L. Bean (Primarily a mail order business, with one store having a sales volume of over $30 million)	172.0
Portland	
Levinsky's (1 specialty store)	10.0
Porteous Mitchell & Braun Co. (6 dept. stores: Me. 4, N.H. 1, Vt. 1, plus 2 Downeast shops)	38.0
MASSACHUSETTS	
Allston	
Alden's, Inc. (25 specialty stores)	20.0
Boston Area	
Filene's (Federated Department Stores, Cincinnati, Oh.) (16 department stores: Mass. 10, N.H. 2, Me. 1, R.I. 1, Conn. 1, N.Y 1)	353.5
Chestnut Hill	55.0
Filene's Basement, Somerville (Federated) (18 stores: Conn. 1, Mass. 10, N.Y. 5, N.J. 1, R.I. 1)	212.8
Flagship, Sommerville, Mass.	80.0
(Ranking 2nd, 3rd, 4th in volume, averaging $10-$15 million; Manhasset (N.Y.), Framingham and Braintree (Mass.)	
(Filene's Basement opened 3 stores in 1986: 2 in Philadelphia, Pa. and 1 in Paramus, N.J.)	
Jordan Marsh (Allied Stores, New York, N.Y.) (18 dept. stores: Conn. 1, Mass. 12, Me. 1, N.H. 2, N.Y. 1, R.I. 1)	546.7
(Jordan Marsh opened its 19th store in Albany, N.Y. in 1986. A Nashua, N.H. store opening is planned.)	

DEPARTMENT/APPAREL SPECIALTY STORE SALES

NORTHEAST	APPROX. SALES (Millions of $)
MASSACHUSETTS (continued)	
Braintree	
Decelle (7 specialty stores)	$ 21.0
Milton's (4 specialty stores)	10.0
Northeast Apparel (60 specialty stores)	100.0
Framingham	
T.J. Maxx (Zayre Corp., Framingham) (191 stores)	840.0
Hingham	
The Talbots (General Mills, Minneapolis, Minn.) (84 stores)	224.0
Hyannis	
Puritan Clothing (8 specialty stores)	15.0
Lynn	
Hoffman's (4 specialty stores)	13.0
Needham Hts.	
Calvert's (2 specialty stores)	23.0
Salem	
Jerry's Dept. Stores, Inc. (Operates Jerry's Dept. Stores and Rich's Dept. Stores -- a total of 16 stores in Me., Mass., N.H.)	140.0
Springfield	
Albert Steiger, Inc. (8 dept. stores: Mass. 7, Conn. 1)	70.0
Topsfield	
Empire Clothing Co. (19 spec. stores in Mass. & Me.)	17.0
Waltham	
Grover Cronin, Inc. (1 jr. dept. store)	12.0
West Bridgewater	
Foxmoor (Dylex Ltd., Toronto, Canada) (607 specialty stores)	210.0
Woburn	
Marshall's (Melville Corp., Harrison, N.Y.) (236 spec. stores)	1,324.0
Worcester	
Chess King (Melville Corp., Harrison, N.Y.) (517 spec. stores)	206.0
NEW JERSEY	
Burlington	
Burlington Coat Factory (74 specialty stores)	343.1
Hackensack	
Joyce Leslie (29 specialty stores)	25.0

DEPARTMENT/APPAREL SPECIALTY STORE SALES

NORTHEAST	APPROX. SALES (Millions of $)
NEW JERSEY (continued)	
Newark	
Bamberger's (name changed to Macy's in 1986) (24 dept. stores: N.J. 14, Pa. 5, N.Y. 1, Dela. 1, Md. 3. Also Furniture Clearance Centers)	1,258.0
Flagship store: Parmus, N.J.	125.0
Newark, N.J.	49.0
Willow Brook, N.J.	70.0
Rockaway, N.J.	60.0
Livingston, N.J.	72.0
King of Prussia, Pa.	60.0
(The 24th store, in Owings Mill, Md., was opened in July 1986. In Feb. 1987, stores will be opened in Marley Station and in Baltimore, Md.; also in 1987 a store in Hamilton Township, N.Y. and in Tyson's Corner, Va. Plans have also been announced for a store in Pentagon City, Washington)	
Hahne & Co. (Associated Dry Goods, New York, N.Y.) (9 dept. stores in N.J.)	130.0
(The downtown Newark store was closed in 1986. Former Gimbels Garden State store, Paramus, will become the new flagship store in the Spring of 1987. Another store will be opened in the Bridgewater Commons in the Spring of 1988.)	
Paramus	
Stern's (Allied Stores, New York, N.Y.) (17 dept. stores: N.Y. 10, N.J. 7)	425.2
(Allied bought nine of the 19 Gimbels-East Division store locations from Batus in August 1986, which had a combined annual volume estimated at $183 million. Eight locations are to be operated as Stern's, including Roosevelt Field in Garden City, N.Y., which had a volume of $30.6 million; Moorestown Shopping Center, Moorestown, N.J.; Echelon Shopping Center, Voorhees, N.J.; Market East and Great Northeast, Philadelphia; King of Prussia Plaza, Pa.; Granite Run, Media, Pa.; Oxford Valley Mall, Langhorne, Pa.)	
Pine Brook	
The Children's Place (Federated Dept. Stores, Cincinnati, Ohio) (158 stores)	159.0
Ridgewood	
Sealfons (Brooks Sealfons, Inc., Summit, N.J.) (6 spec. stores)	20.0
Saddlebrook	
Fashion Barn (111 specialty stores)	50.0
Trenton	
S.P. Dunham & Co. (United Dept. Stores, Newark, N.J.) (4 spec. stores in N.Y. and N.J.)	14.0

DEPARTMENT/APPAREL SPECIALTY STORE SALES

NORTHEAST	APPROX. SALES (Millions of $)
NEW YORK	
Buffalo	
Adam, Meldrum & Anderson (10 dept. stores in N.Y.)	113.0
L.L. Berger, Inc. (7 spec. stores in N.Y.)	17.0
Jenss Dept. Stores (4 dept. stores in N.Y.)	25.0
The Sample, Inc. (10 spec. stores in N.Y.)	25.0
Cohoes	
Cohoes Specialty Stores (5 N.Y. spec. stores)	50.0
Elmira	
S.F. Iszard, Inc. (3 jr. dept. stores in N.Y.)	9.0
Latham	
Interstate Department Stores, Inc. (Toys "R" Us, Rochelle Park, N.J.) (Central buying location for two Boston Stores in New York, two The Fair Stores in Michigan)	40.0
New York City Area	
Abraham & Straus, Brooklyn (Federated Dept. Stores, Cincinnati, Oh.) (15 dept. stores: N.Y. 9, N.J. 4, Pa. 2)	767.5
(The two Pa. stores -- King of Prussia and Willow Grove--have been sold to Strawbridge & Clothier, Philadelphia)	
Alcott & Andrews (6 specialty stores: Conn. 1, D.C. 1, Md. 1, N.J. 1, N.Y. 2)	25.0
Alexander's Dept. Stores, Inc. (14 discount spec. stores: Conn. 1, N.J. 2, N.Y. 11)	520.1
(The Mohegan Lake, N.Y. store was closed in Feb. 1986. The New York City flagship store will be retained and the property redeveloped in 1990 at the earliest).	
B. Altman & Co. (Acquired in 1986 by an international group of investors, led by Anthony R. Conti) (7 dept. stores)	230.0
Flagship store, New York	100.0+
Willow Grove, PA. (closed in January 1986)	9.0
(Altman's Paramus, N.J. store was not included among Altman stores leased to the new owners. The Paramus department store will be expanded to include home furnishings.)	
Ann Taylor (Allied Stores, New York, N.Y.) (73 spec. stores)	148.3
Barney's (1 specialty store)	60.0
(A separate women's specialty store was opened in September 1986. It is expected to reach a volume of $30 million in its first year).	
Henri Bendel (The Limited Inc., Columbus, Ohio) (1 spec. store)	24.0
(Will be moved to larger quarters on Fifth Avenue by end of 1988.)	
Bergdorf Goodman (Carter Hawley Hale, Los Angeles, Calif.) (1 New York City spec. store)	65.0

(New York City Area continued)

DEPARTMENT/APPAREL SPECIALTY STORE SALES

NORTHEAST

NEW YORK

New York City Area (continued)

	APPROX. SALES (Millions of $)
Bloomingdale's (Federated Dept. Stores, Cincinnati, Ohio) (14 dept. stores plus a Home Store, Chestnut Hill, Mass.; Conn. 1, Fla. 1, Md. 1, Mass. 1, N.J. 2, N.Y. 4, Pa. 2, Tx. 1, Va. 1)	$ 955.2
(A Boca Raton, Fla., store was opened in Oct. 1986. Bloomingdale's will open its 17th store--its first in the Midwest--in Chicago in the summer of 1988. Bloomingdale's also started the opening of a series of free-standing airport gift shops with two in New York in November 1986, called Bloomies Express.)	
B. Boman & Co. (18 specialty stores)	28.0
Bonwit Teller (Allied Stores, New York, N.Y.) (15 spec. stores: Mass. 1, N.Y. 3, N.J. 1, Pa. 2, Ill. 2, Mich. 1, Mo. 1, Fla. 2, Ca. 2)	152.1
(Bonwit's will close its Beverly Hills, Calif. store in January 1987. This store had a volume of about $10 million in 1985.) Plans are being discussed to sell the Palm Desert store to Bullocks-Wilshire. This Bonwit Teller unit had a volume of about $8.5 million in 1985.	
Brooks Brothers (Allied Stores Corp., New York, N.Y. (50 stores)	231.1
(Plans to open a store in 1987 in the Gallery at Harbor Point, Baltimore)	
Brooks Fashion Stores (Dylex Ltd., Toronto, Canada) (781 stores)	436.0
Gimbels-East (Batus Inc., New York, N.Y.) (20 stores: N.Y. 8, Conn. 1, N.J. 2, Pa. 8)	472.3
New York flagship (34th St.) (Closed in Sept. 1986)	99.1
86th St., New York City (Closed in Sept. 1986)	47.7
Roosevelt Field	40.6
Cross County Shopping Center, Valley Stream	32.9
Philadelphia flagship	33.1
Cheltenham Square, Cheltenham, Pa.	13.8
Furniture Clearance Center, Paramus, N.J.	1.5
(Nine Gimbels-East store locations were sold by Batus to Allied Stores in August 1986--out of a total of 19. Sales of the stores sold had a combined volume estimated at $183 million. Eight locations are to be operated by Allied as Stern's which is headquartered in Paramus, N.J. Included are the following locations: Roosevelt Field, Garden City, N.Y.; Market East and Great Northeast, Philadelphia, Pa.; King of Prussia Plaza, King of Prussia, Pa.; Oxford Valley Mall, Langhorne, Pa.; Granite Run, Media, Pa.; Echelon Shopping Center, Voorhees, N.J.; Moorestown Shopping Center, Moorestown, N.J. The ninth store, in Lancaster, Pa., will be operated as a Pomeroy's unit. Closing of the Cross County Shopping Center store, Yonkers, N.Y., was postponed.)	
Loehmann's (Associated Dry Goods, New York, N.Y.) (93 off-price specialty stores)	322.0
Lord & Taylor (Associated Dry Goods, New York, N.Y.) (44 stores: Conn. 2, D.C. 1, Fla. 8, Ga. 1, Ill. 7, Md. 1, Mass. 3, Mich. 4, N.J. 2, N.Y. 5, Pa. 2, Tex. 7, Va. 2)	760.0
(A store in Boca Raton, Fla., was opened in October 1986. It is expected to have a volume of from $15 to $18 million in its first year. An eighth Texas store, at River Center, San Antonio, will be opened in the Fall of 1988.)	

(New York City Area continued)

DEPARTMENT/APPAREL SPECIALTY STORE SALES

NORTHEAST

NEW YORK

	APPROX. SALES (Millions of $)
New York City Area (continued)	
Macy's New York (R.H. Macy, New York, N.Y.)(22 dept. stores: N.Y. 14, Conn. 2, Fla. 1, Tex. 5, plus furniture clearance centers)	$ 1,335.7
New York area stores (including Conn.)	1,040.0
Herald Square flagship	359.0+
(A fourth Houston store, in the Houston Galleria, was opened in September 1986. It's first-year volume is projected to reach $60 million, as is the volume of the Dallas Galleria which was opened in October 1986)	
Mays (J.W. Mays Inc., Brooklyn, N.Y.) (4 dept. stores in N.Y.)	81.4
Ohrbach's (Amcena Corp., New York, N.Y.) (12 spec. stores: Ca. 6, N.J. 3, N.Y. 3)	200.0
(Five of the six N.Y./N.J. stores will be closed on Feb. 1, 1987, and will be reopened in March as part of the Howland-Steinbach chain which was acquired by Amcena from Supermarkets General. The 34th St., New York City store is to be closed permanently.)	
J.C. Penney Co., Inc.	13,747.0
Phillips-Van Heusen Corp. (52 spec. stores)	113.3
Saks Fifth Avenue (Batus, Inc., New York, N.Y.) (41 specialty stores: Ariz. 1, Calif. 9, Conn. 1, Fla. 5, Ga. 1, Ill. 3, Kans. 1, La. 1, Md. 1, Mass. 1, Mich. 3, Mo. 2, Nev. 1, N.J. 2, N.Y. 4, Oh. 3, Pa. 2, Tex. 3)	928.0
Flagship store, New York	190.0
(Store openings by Saks Fifth Avenue in 1986; Carmel, Calif.-- a replacement store for the Monterey unit -- opened in May; Owings Mill, Md., opened in August; Tulsa, Okla., in Sept.; Boca Raton, Fla., October. Plans for the Florida unit anticipate a volume of $15 million in its first year.)	
Syms, New York, N.Y. (15 promotional specialty stores)	215.0
(Manhattan Express a new chain of men's and young men's specialty stores will be lauched by a group of investors. They expect to have 19 N.Y.-area stores in operation within two years. The first five stores, to be opened by June 1987, are expected to have combined volume of $20 to $25 million in the first full year of operation.)	
Patchogue	
Swezey & Newings, Inc. (3 N.Y. dept. stores)	22.0
Rochester	
B. Forman & Co. (McCurdy & Co., Rochester) (14 N.Y. spec. stores)	90.0
McCurdy & Co. (7 N.Y. dept. stores)	60.0
Sibley, Lindsay & Curr (Associated Dry Goods, New York, N.Y.) (14 N.Y. dept. stores)	180.0
Schenectady	
The Carl Co. (7 N.Y. dept. stores)	30.0
Syracuse	
The Addis Co. (4 N.Y. spec. stores)	9.0
Chappell's Dept. Store (7 N.Y. spec. stores)	33.0
Dey's (Allied Stores Corp., New York, N.Y.) (4 N.Y. spec. stores)	38.4

DEPARTMENT/APPAREL SPECIALTY STORE SALES

NORTHEAST	APPROX. SALES (Millions of $)
NEW YORK	
Westbury	
Masters, Inc. (159 specialty stores)	$ 116.0
White Plains	
Howland-Steinbach (Supermarkets General, Woodbridge, N.J.) (28 stores in New York and New England)	162.6
(In June 1986, 23 of the 28 stores were acquired by Amcena which will combine them in an operation with 5 former Ohrbach's acquired by Amcena from Supermarkets General.)	
PENNSYLVANIA	
Allentown	
Hess's Department Stores, Inc. (Crown American Corp., Johnstown, Pa.) (39 stores: Md. 1, N.Y. 6, Pa. 26, Va. 5, W. Va. 1)	330.7
(A Pembroke Mall, Virginia Beach store and a store in Franklin Mall, Washington, Pa. were opened in 1986. Hess's has set a target for 50 units with a total volume of $500 million by 1990. In 1987, two stores will be opened in Richmond, Va., and two in the Hampton Roads, Va. This will make 8 stores in the Hampton Roads area with an anticipated total of more than $100 million.)	
Bensalem	
Charming Shoppes Inc. (550 women's specialty stores in 26 states)	391.6
Harrisburg	
Pomeroy's Inc. (Allied Stores, New York, N.Y.) (Seven central and western Pa. dept. stores, not including eight stores operated out of the Levittown, Pa. headquarter store.)	65.0
Huntingdon Valley	
Artie's Inc. (17 specialty stores)	12.0
Johnstown	
Glosser Bros. Department Store Div. (1 dept. store)	11.0
Lancaster	
Watt & Shand (2 Pa. dept. stores)	31.0
Levittown	
Pomeroy's Inc. (Allied Stores, New York, N.Y.) (8 dept. stores: Del. 1, N.J. 1, Pa. 6)	90.0
(A former Gimbels-East store located in Lancaster and acquired by Allied in June 1986 is to be operated as a Pomeroy's unit)	
Philadelphia	
Deb Shops Inc. (190 women's specialty stores in Eastern states)	147.1
Gimbels (Gimbels-East, New York, N.Y.) (9 dept. stores)	300.0
Philadelphia flagship	33.1
Cheltenham Square, Cheltenham, Pa.	13.8
(All stores were closed in 1986)	

(Philadelphia continued)

DEPARTMENT/APPAREL SPECIALTY STORE SALES

NORTHEAST	APPROX. SALES (Millions of $)
PENNSYLVANIA	
Philadelphia (continued)	
Strawbridge & Clothier (12 department stores)	$ 379.9
(Acquired two Abraham & Straus stores in 1986" King of Prussia and Willow Grove, Pa., Strawbridge & Clothier operates 20 discount variety stores, Clover Stores, with a 1986 volume of $307 million. A Clover store was opened in Penrose Plaza, Philadelphia in the Fall, 1986.)	
John Wanamaker (Carter Hawley Hale, Los Angeles, Ca.) (16 stores incl. The Globe (Cleland-Simpson), Scranton; other stores: Del. 1, N.J. 2, N.Y. 1, Pa. 11)	450.8
Philadelphia flagship	98.8
Northeast Philadelphia	30.9
Yonkers, N.Y. (Cross County Shopping Center)	27.0+
Harrisburg	27.0
Moorestown, N.J.	25.2
Reading, Pa.	17.6
The Globe Store	27.0
(In November 1986, Carter Hawley Hale sold Wanamakers to Woodward & Lothrop, Washington, D.C.)	
Pittsburgh	
Gimbels-Pittsburgh (Batus Inc., New York, N.Y.) (7 Pa. dept. stores, of which it owned 4) (All stores are to be liquidated by Batus)	130.6
Mellon Square, downtown Pittsburgh (may be sold to May Dept. Stores)	34.5
Monroeville (sold in 1986 to May Dept. Stores Co.)	23.7
Eastland (to be closed in 1987)	7.9
Beaver Valley (sold to May Dept. Stores in 1986)	8.7
South Hills Mall, Mt. Lebanon (sold to May Dept. Stores in 1986)	24.1
North Hills (to be moved to Ross Park Mall by the developer)	19.0
Century III (to be subleased to Consolidated Stores International Corp. and operated as a Gimbels unit)	12.6
(The three Gimbels stores purchased by May Dept. Stores Co. in 1986 are to be operated as branches of Kaufmann's)	
Joseph Horne Co. (Associated Dry Goods, New York, N.Y.) (15 dept. stores: Oh. 3, Pa. 12)	209.0
Mellon Square, downtown Pittsburgh	44.0
(An agreement was signed by May Dept. Stores Co.--owners of ADG--to sell Joseph Horne Co. to a group of Pittsburgh investors in November 1986. A Century Mall, Pittsburgh, store was opened November 1986.)	
Kaufmann's (May Department Stores Co., St. Louis, Mo.) (18 dept. stores: Oh. 7, Pa. 10, W.Va. 1)	
Total--including Strouss	423.9
Mellon Square	90.0
(In 1986, the Strouss Co. of Youngstown, Ohio, was merged with Kaufmann's, and the 4 stores operated as Kaufmann's. See notations above regarding the three Gimbels-Pittsburgh stores acquired in 1986 from Batus. A store opening in Ross Park Mall, Pittsburgh, is scheduled for Fall 1986.)	

DEPARTMENT/APPAREL SPECIALTY STORE SALES

	APPROX. SALES (Millions of $)
NORTHEAST	
PENNSYLVANIA	
Quakerstown	
Apparel Affiliates (89 specialty stores)	$ 43.0
Reading	
Boscov's Dept. Stores, Inc. (11 dept. stores: Del. 1, N.Y. 1, Pa. 9)	250.0
Boscov's East, Reading (enlarged in 1985)	25.0
Wilkes Barre	35.0
(A store in Harrisburg, Pa., was opened in Fall 1986)	
York	
S. Grumbacher & Sons, Inc. (Bon Ton Dept. Store Div.) (24 jr. dept. stores in Ind., Md., Ohio, Pa., W. Va., operated under various names)	75.0
VERMONT	
Burlington	
Magrams (3 specialty stores)	12.0
MIDWEST	
ILLINOIS	
Bridgeview	
Paddor's (8 specialty stores)	14.0
Burr Ridge	
Al Baskin (8 specialty stores)	43.0
Chicago Area	
Carson Pirie Scott & Co. (Retail Group: department and specialty stores.) The County Seat stores (301 units) had a sales volume of $290 million in 1985)	
Department stores (20 stores: Ill. 17, Ind. 3)	400.4
State Street	100.0+
Yorktown, Lombard, Ill.	30.0+
Randhurst, Mt. Prospect, Ill.	30.0+
(Carson Pirie Scott will open its second Corporate Level specialty store in Washington, D.C. in Feb. 1987. It is expected to have a volume of $5 million in its first year. The Corporate Level store in the basement of the Chicago main store has an annual volume of $6 million. In addition, Metropolis, a mall-like cluster of shops on the second floor of the State Street flagship is expected to generate a volume of $25 million by the end of 1986.) Total sales of Chicago area stores were estimated at $420 million in 1985.)	
Crawford Dept. Stores (3 gen. mdse. stores in Ill.)	15.0
Goldblatt Bros., Inc. (9 Chicago area dept. stores)	34.0
K-mart Corp. (62 stores in Chicago area.)	525.0

(Chicago area continued)

MIDWEST	APPROX. SALES (Millions of $)
ILLINOIS	
Chicago area (continued)	
Lord & Taylor (Lord & Taylor, New York, N.Y.) (7 Chicago area stores)	125.0
North Michigan Avenue	37.0
I. Magnin (I. Magnin, San Francisco, Calif.)	
North Michigan Avenue	24.5
Northbrook	13.2
Oakbrook	11.5
Main Street (Federated Department Stores, Cincinnati, Oh.) (9 stores)	50.3
(2 stores were opened in the Chicago area in 1986; 4 Detroit area stores are to be opened.)	
Marshall Field (Batus Inc., New York, N.Y.) (21 dept. stores: Ill. 17, Tex. 3, Wis. 1)	790.0
Chicago area total (17 stores)	700.0
State Street	175.0
Water Tower Place, North Michigan Avenue	66.0
Old Orchard, Skokie, Ill.	85.0+
Oakbrook, Ill.	65.0+
Woodfield, Ill.	55.0+
(A store in San Antonio will be opened in Nov. 1986)	
Montgomery Ward (17 stores)	260.0
(In 1986 the flagship store was closed. 11 stores are to be remodeled as specialty stores)	
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.)	
Michigan Avenue store	50.0
Oakbrook and Northbrook combined volume	50.0
J.C. Penney (17 full-line stores, 2 soft-line stores)	400.0
(A new store in Calumet City, Ill. was opened in 1985)	
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.)	
Michigan Avenue store	31.0
Oakbrook	14.0
Old Orchard	17.5
Sears Roebuck (16 full-line department stores, 4 small hard-line stores)	450.0
(Corporate total of all U.S. merchandising operations: $21,549.0 million.)	
Stanley Korshak (2 specialty stores)	17.0
(A Dallas store opened in March 1986 is expected to attain a volume of $9.8 million in its first year.)	
Charles A. Stevens (26 spec. stores)	65.0
Wieboldt Stores, Inc. (WSI Acquisition Corp.) (12 dept. stores)	160.1
Zayre's (37 stores)	400.0

(Chicago's shopping area on North Michigan Avenue is undergoing an expansion with the construction of two vertical shopping malls, renovations, and enlargements by major stores. Saks Fifth Avenue is planning to move to larger quarters in the new Chicago Place vertical shopping/residential complex. Bloomingdale's will open its first Midwest store in the 900 Michigan Ave. complex.)

DEPARTMENT/APPAREL SPECIALTY STORE SALES

MIDWEST	APPROX. SALES (Millions of $)
ILLINOIS	
Elgin	
Joseph C. Spiess Co. (3 dept. stores)	21.0
Peoria	
P.A. Bergner & Co. (headquarters moved in 1985. See Milwaukee)	-
Szold's, Inc. (4 stores)	12.0
River Forest	
Madigan's (5 specialty stores)	35.0
Tinley Park	
Gately's People's Store (1 jr. dept. store)	12.0
INDIANA	
Hammond	
Rosalee Stores (8 specialty stores)	$ 14.0
Indianapolis	
L.S. Ayres & Co. (Associated Dry Goods Corp., New York, N.Y.) (25 dept. stores in Ind., Ky., Ohio) (ADG merged its seven-store Stewart Dry Goods Division into Ayres in Jan. 1986)	430.0
Block's (Allied Stores, New York, N.Y.) (11 dept. stores in Indiana)	90.6
Paul Harris Stores (243 specialty stores)	125.9
New Albany	
Gaytime Fashions (3 stores)	13.0
South Bend	
Deitch-Corson (3 gen. mdse. stores in Ind.)	13.0
IOWA	
Cedar Rapids	
Armstrong's (2 Ia. dept. stores)	20.0
Davenport	
Petersen-Harned-Von Maur, Inc. (10 dept. stores: Ill. 1, Ia. 9)	50.0+
Des Moines	
Younkers, Inc. (Equitable of Iowa Companies, Des Moines, Ia.) (26 dept. stores: Ill. 1, Ia. 21, Mn. 1, Neb. 2, S.D. 1) (Younkers has announced plans to buy 11 J.L. Brandeis & Sons (Omaha) department stores.)	181.0
KANSAS	
Kansas City (See MISSOURI)	
Washington	
Seiferts (130 stores)	60.0
Wichita	
Henry's (2 Kans. spec. stores)	13.0

DEPARTMENT/APPAREL SPECIALTY STORE SALES

MIDWEST

	APPROX. SALES (Millions of $)
MICHIGAN	
Detroit	
Crowley, Milner & Co. (Oakland Holding Co.) (10 spec. stores in southeast Mich.)	104.1
(A Fashion Distribution Center in downtown Detroit was opened in 1985. In Aug. 1986 Crowley Milner opened a store in Courtland Center, Flint, Mich. which is expected to generate $10 million in volume in its first full year. Also in Aug. 1986, Crowley, Milner moved its downtown flagship from New Center to the new New Center One Complex in Detroit, and this is expected to do $8.4 million in its first year. A Westland, Mich. store was to be opened in Oct. 1986.)	
(Main Street (Federated Dept. Stores) opened 3 Detroit-area specialty stores in Nov. 1986. Mervyn's--based in Hayward, Calif. -- will open its first Midwest stores, in the Detroit area in 1987, and has plans for 30 stores)	
Grand Rapids	
Beverly's Inc. (18 specialty stores)	10.0
Gantos (43 stores)	60.0
Herpolsheimer's (6 Mich. dept. stores) (Allied Stores Corp., New York)	22.8
Paul Steketee & Sons (6 Mich. gen. mdse. stores)	26.0
Jackson	
Jacobson's Stores Inc. (20 dept. stores: Fla. 9, Mich. 10, Ohio 1) (Will open a store in Livonia, Mich. in 1987)	275.0
Kalamazoo	
Gilmore Brothers, Inc. (4 gen. mdse. stores in Mich.)	10.0
Redwood & Ross (20 stores)	15.0
Saginaw	
W.C. Wiechmann Co. (3 Mich. gen. mdse. stores)	10.0
MINNESOTA	
Duluth	
Duluth Glass Block Stores Co. (Mercantile Stores, New York, N.Y.) (1 dept. store)	20.0
Eden Prairie	
Braun's (98 specialty stores)	41.0
Mankato	
Bretts Dept. Stores (5 Minn. jr. dept. stores)	11.0

DEPARTMENT/APPAREL SPECIALTY STORE SALES

MIDWEST	APPROX. SALES (Millions of $)
MINNESOTA	
Minneapolis	
Dayton Hudson (37 stores in Mich., Minn., N.D., S.D., Wis.)	$ 1,447.9
Donaldson's (Allied Stores, New York, N.Y.) (15 stores: Ia. 2, Minn. 13)	156.8
Lancer Stores (37 specialty stores)	16.0
St. Cloud	
G.R. Herberger's (28 dept. stores: Minn. 10, Mont. 3, Neb. 4, N.D. 4, S.D. 2, Wis. 3, Wyo. 1)	78.0
MISSOURI	
Joplin	
Newman's (6 spec. stores: Kans. 2, Mo. 2, Okla. 2)	22.0
Kansas City	
Jack Henry Clothing (Hart, Schaffner, Marx) (5 spec. stores in Missouri)	14.5
The Jones Store (Mercantile Stores, New York, N.Y.) (7 dept. stores)	195.0
(Purchased two units from Dillard in 1986 which will be operated as Jones Stores)	
Macy's (Macy's Atlanta) (13 stores: Kans. 6, Mo. 6, Oh. 1.)	not available
(In 1986, 12 Macy dept. stores located in Kansas City, Wichita and Topeka, Kansas, were bought by Dillard. The downtown Kansas City store was closed, but will be reopened as part of the AT&T Town Pavilion. Dillard, in turn, sold 2 stores--Overland Park, Kans. and Independence, Mo.--to Mercantile Stores to become Jones Stores.)	
Woolf Brothers (8 specialty stores)	33.0
St. Louis	
Dillard Dept. Stores, St. Louis Div. (11 stores: Ill. 1, Ka. 1, Mo. 9)	not available
Edison Apparel (Edison Bros. Stores, St. Louis, Mo.) (1,302 stores)	281.0
Famous-Barr (May Dept. Stores Co., St. Louis, Mo.) (17 dept. stores: Mo. 14, Ill. 3)	460.5
Flagship store, St. Louis, Mo.	60.0
(Northwest Plaza store was reopened after extensive remodeling in October 1987)	
Gateway Apparel (125 specialty stores)	200.0
Worth Stores (130 specialty stores)	40.0

DEPARTMENT/APPAREL SPECIALTY STORE SALES

	APPROX. SALES (Millions of $)
MIDWEST	
MISSOURI	
Springfield	
Heer's (Allied Stores Corp., New York, N.Y.) (2 Mich. dept. stores)	8.3
NEBRASKA	
Kearney	
Brass Buckle (30 specialty stores)	16.0
Omaha	
J.L. Brandeis & Sons (11 dept. stores: Ia. 2, Neb. 9)	96.0
(J.L. Brandeis are to be sold to Younkers, Des Moines, Ia.)	
Richman-Gordman Stores, Inc. (12 gen. mdse. stores: Ia. 4, Kans. 2, Nev. 6)	197.0
NORTH DAKOTA	
Fargo	
de Lendrecie's, West Acres Shopping Center (Part of Hennessey's, Billings, Mont. owned by Mercantile Stores Co., New York, N.Y.) (1 gen. mdse. store)	15.0
Vanity Shops (37 stores)	12.0
OHIO	
Akron	
M. O'Neil Co. (May Department Stores, St. Louis, Mo.) (10 Ohio dept. stores)	175.4
Ashtabula	
Carlisle's (9 dept. stores: Oh. 5, Pa. 4)	41.0
Bowling Green	
Fred W. Uhlman & Co. (16 spec. stores: Ind. 1, Ohio 15)	32.0
Cincinnati	
Giddings Jenny (B. Miller Inc.) (5 specialty stores: Ind. 1, Oh. 4)	25.0
(An agreement has been reached to sell its assets to Union Co., an affiliate of Schottenstein Stores, Columbus, Ohio, to be operated as Giddings-Union.)	
McAlpin Co. (Mercantile Stores, New York, N.Y.) (9 stores in Ohio and Ky.)	325.0
(Shillito Rikes (Federated Department Stores, Cincinnati, Oh.) with a 1985 volume of about $400 million, was absorbed by F.& R. Lazarus, Columbus, Ohio in Jan. 1986, forming a new 31-store division.)	
Cleveland	
The Higbee Co. (11 dept. stores in Ohio plus a budget store and a home store)	280.8
The May Co., Cleveland (May Department Stores, St. Louis, Mo.) (10 dept. stores in Oh.)	238.6

DEPARTMENT/APPAREL SPECIALTY STORE SALES

MIDWEST

	APPROX. SALES (Millions of $)
OHIO	
Columbus	
Lazarus (Federated Deptartment Stores, Cincinnati, Oh.) Absorbed Shillito Rikes, Cincinnati stores in Jan. 1986, forming a new division with 31 stores. Combined volume: (Plans to open a new store in Newark, Ohio)	$ 856.2
Madison's Inc. (14 spec. stores)	21.0
Dayton	
Elder-Beerman (25 dept. stores in Ohio & Indiana)	220.9
Toledo	
Lion Dry Goods (Mercantile Stores Co., New York N.Y.) (3 stores)	110.4
Youngstown	
Strouss (May Department Stores, St. Louis, Mo.) (7 dept. stores) (The Salem, Ohio, store was closed in Nov. 1985. In June 1986, May merged Strouss with Kaufmann's, Pittsburgh, Pa. The combined 1985 volume was estimated at $423.9 million.)	95.0
WISCONSIN	
Brookfield	
T.A. Chapman (7 gen. mdse. stores in Wis.)	13.0
Kohl's Department Stores (Batus Inc., New York, N.Y.) (39 dept. stores: Ill. 6, Ind. 8, Wis. 25) (Sold by Batus in 1986 in a leveraged buyout by a management group.)	300.0
Green Bay	
Prange's (H.C. Prange Co., Sheboygan, Wis.) (20 dept. stores) (Green Bay is the buying headquarters location)	140.0
Milwaukee	
P.A. Bergner (33 stores: Ill. 23, Wis. 10) (In 1986 Bergner reached an agreement to buy three Gimbels-Midwest units in Wisconsin from Batus, including the Southgate Mall and Mayfair Mall in Milwaukee and the East Towne Mall unit in Madison. All three will be renovated and operated under the name of the Boston Store, the Milwaukee-based department store company that Bergner purchased from Federated in 1985.)	410.0
Boston Store (P.A. Bergner, Milwaukee, Wis.) Downtown Milwaukee	29.0
Gimbels-Midwest (Batus Inc., New York, N.Y.) (8 stores in Wis.) (Batus sold three stores to P.A. Bergner in 1986, as noted above. Marshall Field's acquired four Gimbels-Midwest stores, which have been closed for remodeling and are to be reopened in late 1986 as Marshall Field's. Packard Plaza store was closed in August 1986.)	195.4
1985 volume of specified Gimbels-Midwest stores:	
Downtown	36.2
Southridge	29.4
Northridge	24.5
Hillsdale	22.0
Mayfair Mall (to be opened as Gimbels until 1987, then became a Bergner's)	34.5
Marshall Field, Mayfair Mall (1 store)	27.0

DEPARTMENT/APPAREL SPECIALTY STORE SALES

	APPROX. SALES (Millions of $)
SOUTH	
ALABAMA	
Anniston	
Wakefield's (5 specialty stores)	$ 17.0
Birmingham	
Parisian Inc. (14 spec. stores: Ala. 13, Ga. 1))	186.0
(A store in Chattanooga, Tenn. and one in Pensacola, Fla. will be opened in 1987. Plans are also underway for a store to open in Sarasota, Fla. Intends to close its Home Store Departments by early 1987 and allocate the space to apparel departments)	
Pizitz, Inc. (12 department stores in Ala., 1 in S.C.)	100.0
(A Riverside Galleria store was opened Feb. 1986; the Five Point West, S.C. store was closed Jan. 1986. Pizitz will acquire McRae's, Jackson, Miss.)	
Yeildings (5 specialty stores)	13.0
Mobile	
C.J. Gayfer & Co., Springdale Plaza (Mercantile Stores, New York, N.Y.) (12 dept. stores: Ala. 3, Fla. 6, Miss. 3)	315.0
(A Dothan, Ala., store opening is planned.)	
Montgomery	
Gayfers/Montgomery Fair (Mercantile Stores, New York, N.Y.) (6 dept. stores: Ala. 4, Ga. 2)	150.0
James Stores (8 spec. stores)	6.0
ARKANSAS	
El Dorado	
J.A. West Co. (11 jr. dept. stores in Ark., La., Mo., Okla., Tex.)	13.0
Fort Smith	
Hunt Dry Goods Co. (7 gen. mdse. stores: Ark. 6, Tex. 1)	11.0
Little Rock	
M. M. Cohn (10 specialty stores in Ark., Okla., Tenn.)	50.0
Dillard Dept. Stores Inc.: The Little Rock Division had 19 stores: Ark. 7, La. 5, Tenn. 4, Tex. 3	not available
DISTRICT OF COLUMBIA (Also see listings in Virginia and Maryland)	
Garfinckel's (Allied Stores, New York, N.Y.) (10 spec. stores: D.C. 2, Md. 3, Va. 5)	112.4
Flagship store, Washington, D.C.	35.0
Hecht's (May Department Stores, St. Louis, Mo.) (23 dept. stores: D.C. 1, Md. 16, Va. 6)	567.8
(Sales in the Metro Center store, opened November 4, 1985, were reported to be running at an annual rate of $60 million. A store in Owings Mill Town Center, Md. was opened August 1986 and in Glen Burnie, Md. in October. A store is to be built in the Wheaton Plaza Shopping Center, Montgomery County, Md. Two Baltimore area stores are to be closed: Reistertown and Northwood).	

(Distict of Columbia continued)

DEPARTMENT/APPAREL SPECIALTY STORE SALES

	APPROX. SALES (Millions of $)
SOUTH	
DISTRICT OF COLUMBIA (continued)	
Raleighs (12 specialty stores)	$ 75.0
(A new flagship store in Washington is under construction.)	
Woodward & Lothrop (Taubman Holdings, Detroit, Mich.) (17 dept. stores: D.C. 1, Md. 10, Va. 4, plus a Clearance Store)	470.4
(The downtown store was reopened in Oct. 1986 after renovation. It is expected to generate a volume of $80 million in its first year. A store will be opened in Wheaton Plaza Shopping Center, Montgomery County, Md. In November 1986 the sale of John Wanamakers, Philadelphia--which had a volume of $450.8 million--to Woodward & Lothrop was announced by Carter Hawley Hale.)	
(Nordstrom has announced plans to open a store in Tyson's Corner, Va. -- its first East Coast store, followed by a store opening in McLean, Va.)	
FLORIDA	
Bradenton	
Beall's Dept. Stores, Inc. (28 spec. stores in Fla.)	84.0
Jacksonville	
May-Cohen's (May Department Stores, St. Louis, Mo.) (6 Fla. dept. stores)	73.5
The Vogue Shops, Inc. (141 specialty stores in the South)	75.0
Miami-Palm Beach-Fort Lauderdale Area	
Bloomingdale's (Bloomingdale's, New York, N.Y.) The Falls Mall, South of Miami	55.0
(Boca Raton Town Center store opened Oct. 1986)	
Burdine's (Federated Dept. Stores, Cincinnati, Ohio) (29 dept. stores in Fla.)	757.5
(A Palm Beach store will be opened in 1988)	
JByron's Department Stores (Amcena, New York, N.Y.) (49 dept. stores in Fla.)	200.0+
Jordan Marsh-Florida (Allied Stores, New York, N.Y.) (16 dept. stores in Fla.)	262.9
(A Boynton Beach, Fla. store will be opened by Jordan Marsh.)	
(In addition to Bloomingdales, other New York stores in the Miami area include Saks Fifth Avenue, Lord & Taylor and Macys.)	
Tampa-St. Petersburg	
Maas Brothers, Inc. (Allied Stores, New York, N.Y.) (21 stores in Fla.)	339.3
(Leng's of Savannah was merged into Maas Bros. in 1986)	
Robinson's of Florida (Associated Dry Goods, New York, N.Y.) (9 dept. stores in Fla.)	115.0
(A store in Orlando, Fla. was opened in Aug. 1986)	

DEPARTMENT/APPAREL SPECIALTY STORE SALES

SOUTH	APPROX. SALES (Millions of $)
FLORIDA	
Winter Park	
Ivey's-Florida (Batus Inc., New York, N.Y.) (11 dept. stores in Fla.) (A Gainesville, Fla. store opening is planned.)	$ 110.0
GEORGIA	
Americus	
Tog Shop (5 specialty stores)	30.0
Atlanta	
Macy's-Atlanta (26 stores: Ala. 1, Ga. 13, Kans. 6, S.C. 1, Kans. 5)	612.1
(A home store was opened in Atlanta in Oct. 1986, as well as a store in New Orleans which is expected to reach a volume of $40 million in its first year. Macy's also opened a store in Birmingham, Ala. in 1986.)	
H. Kessler & Co. (6 Ga. stores plus a wholesaling operation)	15.0
Rich's (Federated Dept. Stores, Cincinnati, Ohio) (17 dept. stores: Ala. 2, Ga. 13, S.C. 2, plus Outlet Home Store, Atlanta)	647.0
(Three stores were opened in 1986: Riverchase Galleria; Birmingham, Town Center, Cobb County, Ga. and Atlanta. Rich's discount operation -- 31 Richway stores--was merged into 45-store Gold Circle, Columbus, Ohio in Jan. 1986. Combined 1985 volume was reported at $1.1 billion)	
Augusta	
J.B. White & Co. (Mercantile Stores, New York, N.Y.) (7 stores: Ga. 3, S.C. 4)	130.0
LaGrange	
Mansour's, Inc. (1 jr. dept. store)	11.0
Marietta	
Banker's Note (34 specialty stores)	21.0
Savannah	
Levy's of Savannah, Inc. (Allied Stores, New York, N.Y.) (2 spec. stores)	17.0
(Levy's was merged into Maas Bros., Tampa, Fla. in 1986)	

DEPARTMENT/APPAREL SPECIALTY STORE SALES

SOUTH	APPROX. SALES (Millions of $)
KENTUCKY	
Lexington	
Dawahare's (20 specialty stores)	$ 27.0
Embry & Co. (5 spec. stores)	10.0
McAlpin Co. (Mercantile Stores Co., New York, N.Y.) (2 jr. dept. stores)	20.0
Louisville	
Bacon's Roots (Mercantile Stores, New York, N.Y.) (7 dept. stores: Ind. 2, Ky. 5)	150.0
Behr Stores (34 spec. stores in Ala., Ariz., Ga., Ky. N.C., S.C., Tenn.)	20.0
Fashion Shop (7 specialty stores)	18.0
LOUISIANA	
Alexandria	
Wellan's (3 gen. mdse. stores in La.) (Acquired Palais Royal, Shreveport, in Dec. 1985; which is operated as a separate organization.)	13.0
Baton Rouge	
Goudchaux/Maison Blanche, Inc. (7 dept. stores in La.)	216.5
Harahan	
Wiener Enterprises (104 specialty stores)	55.4
Lafayette	
Abdalla's Lafayette Inc. (5 spec. stores)	19.0
Minden	
West & Co. of La., (21 gen. mdse. stores in Ala., Ark., La., Miss., Tex. plus seven discount centers)	35.0
New Orleans	
D.H. Holmes Co. (18 dept. stores: Ala. 1, La. 14, Miss. 2, Fla. 1) (Plans to open a store in Alexandria, La. in 1986)	272.8
Krauss Co., Ltd. (1 dept. store)	19.0
Kreeger's (4 stores)	14.0

(Macy's Atlanta opened its first stores in New Orleans in Oct. 1986. It is expected to do $40 million in sales in its first year. A second New Orleans store will be opened in two years)

Shreveport	
Beall-Ladyman (56 specialty stores in Ala., Ark., La., Miss.)	110.0
Palais Royal (8 specialty stores)	11.0

DEPARTMENT/APPAREL SPECIALTY STORE SALES

SOUTH	APPROX. SALES (Millions of $)
MARYLAND	
Baltimore	
L. Epstein & Sons (10 jr. dept. stores in Md.)	$ 32.0
Hutzler's (10 dept. stores in Md., including two in Baltimore)	107.0
(Hutzler also owns Sara Fredericks, a women's specialty retailer with sportswear shops and designer salons in Fla. and the East Coast. The total volume of this chain was about $15 million when it was acquired in 1984. The Inner Harbor, Baltimore store closed Dec. 1986. It had a volume of about $3.4 million)	
Princess Shops (25 specialty stores)	20.0
(Sales figures are not available for Hochschild, Kohn (Supermarkets General) stores headquartered in Baltimore. These stores were not included in sales of stores by Supermarkets General to Amcena in 1986.)	
Salisbury	
Hess Apparel (7 specialty stores)	11.0
Townson	
Merry-Go-Round (334 specialty stores)	164.1
MISSISSIPPI	
Jackson	
McRae's, Inc. (15 dept. stores: Fla. 1, Miss. 12, La. 1, Ala.1)	199.8
(McRae's is to be sold to Piziztz, Birmingham, Ala.)	
NORTH CAROLINA	
Charlotte	
The Cato Corp. (425 specialty stores)	116.6
Ivey's-Carolinas (Batus Inc., New York, N.Y.) (13 dept. stores: N.C. 12, S.C. 1)	140.0
(Batus will consolidate Ivey's-Carolinas and Ivey's-Florida in the Spring of 1987. A Durham, N.C. store opening is planned.)	
OKLAHOMA	
Oklahoma City	
C.R. Anthony (272 general mdse. stores)	427.0
Balleet's (3 specialty stores)	10.0
(John A.Brown Co.'s department stores were acquired by Dillard Department Stores Central Division, Fort Worth in Jan. 1985) Dillard now operates two former John A. Brown stores -- in Oklahoma City and in Tulsa. Sanger Harris opened two former John A. Brown stores in Oklahoma in March 1986 and expects each to reach a volume of $25 million in its first year.)	19.0
Tulsa	
Renberg's (4 specialty stores)	24.0
(Hampton's, Kensington Galleria (formerly a Sakowitz store) opened Nov. 1985. A volume of $8 million is expected in its first year.)	

DEPARTMENT/APPAREL SPECIALTY STORE SALES

SOUTH	APPROX. SALES (Millions of $)
SOUTH CAROLINA	
Charleston	
Kerrison's Dept. Stores (3 S.C. dept. stores)	$ 11.0
Columbia	
James L. Tapp Co. (4 S.C. spec. stores)	12.0
Greenville	
Meyers-Arnold Co. (9 dept. stores: Ga. 2, N.C. 2, S.C. 5)	26.0
Myrtle Beach	
Chapin Co. (1 gen. mdse. store)	12.0
Spartanburg	
Belk-Hudson (Belk Stores Services, Inc., Charlotte, N.C.) (4 jr. dept. stores in S.C.)	17.0
TENNESSEE	
Alcoa	
Proffitt's Dept. Stores (5 dept. stores in Tenn.)	43.0
Athens	
Goody's Family Clothing (45 stores)	48.0
Chattanooga	
Loveman's (5 Tenn. dept. stores)	30.0
The Leader (5 specialty stores)	15.0
Knoxville	
Millers (Allied Stores, New York, N.Y.) (13 dept. stores: Ga. 1, Tenn. 11, Va. 1)	99.7
Ira A. Watson Co. (19 stores: Ala. 1, Ky. 9, Tenn. 4, Va. 2, W.Va. 3)	48.0
Memphis	
Casual Corner of Memphis (19 stores)	11.0
Goldsmith's (Federated Department Stores, Cincinnati, Ohio) (6 dept. stores in Tenn.)	169.1
Nashville	
Cain-Sloan (Allied Stores Corp., New York, N.Y.) (4 dept. stores in Tenn.)	62.0
The Castner Knott Dry Goods Co. (Mercantile Stores, New York, N.Y.) (11 dept. stores: Ala. 3, Ky. 1, Tenn. 7)	200.0
The Harvey Co. (8 jr. dept. stores: Ky. 1, Tenn. 7)	27.0

DEPARTMENT/APPAREL SPECIALTY STORE SALES

SOUTH	APPROX. SALES (Millions of $)
TEXAS	
Abilene	
Thornton's Dept. Stores, Inc. (Idaho Dept. Stores, Boise, Id.) (4 jr. dept. stores)	$ 10.0
Austin	
Scarbrough's (3 dept. stores in Tex.)	23.0
Beaumont	
The Fair (23 spec. stores in Tex. and La.)	51.0
White House Co. (Boston Stores Dry Goods, Fort Smith, Ark.) (6 gen. mdse. stores: Ark. 2, La. 1, Tex. 3. Also operates Gus Mayer store in Beaumont.)	45.0
Dallas	
Colbert's (10 spec. stores)	15.0
Joske's (Allied Stores) (27 dept. stores)	392.2
(Three regional Joske's headquarters were consolidated in Dallas in 1985)	
Michael's stores (32 spec. stores plus 11 franchise operations)	46.4
Neiman-Marcus (Carter Hawley Hale, Los Angeles, Calif.) (22 spec. stores: Calif. 5, D.C. 1, Fla. 2, Ga. 1, Ill. 3, Mass. 1, Mo. 1, Nev. 1, N.Y. 1, Tex. 6)	820.0
Sanger-Harris (Federated Department Stores, Cincinnati, Oh.) (16 dept. stores in Tex. and Okla., 2 former Levy's specialty stores in Tucson.)	450.7
(Sanger-Harris opened 2 locations in Oklahoma City in 1986 which were former John A. Brown stores. It will open a third store there in 1988. The Valley View and Tyler, Tex. stores were renovated in 1985.)	
(Macy's New York opened a store in the Dallas Galleria in October 1985. It is expected to reach a volume of $60 million in its first year.)	
Fort Worth	
Dillard Dept. Stores, Fort Worth Div. (Dillard Dept. Stores, Little Rock, Ark.) (35 stores: Kans. 3, Mo. 4, Okla. 13, Tex. 15)	not available
Monnig's (17 dept. and specialty stores in Texas)	45.0
Pace, Newsom & Moates (37 general mdse. stores in Tex.)	39.0
Houston	
Craig Stores (21 spec. stores. Also 5 Buelow Stores)	50.0
Foley's (Federated Dept. Stores, Cincinnati, Oh.) (17 dept. stores in Tex.)	680.3
Houston area (12 stores):	
Sharpstown	80.0
Memorial City	70.0
(A Corpus Christi store will be opened in March 1987.)	

(Houston continued)

DEPARTMENT/APPAREL SPECIALTY STORE SALES

SOUTH	APPROX. SALES (Millions of $)
TEXAS	
Houston (continued)	
Frost Bros. (Frost Bros., San Antonio, Tex.)	
3 Houston area stores (River Oaks, Galleria and Memorial City)	$ 31.0
Joske's (Joske's, Dallas, Tex.)	
11 Houston area stores	170.0
Galleria	36.0
Lord & Taylor (Lord & Taylor, New York, N.Y.)	
4 Houston area stores	60.0
Galleria	23.0
Macy's (R.H. Macy Co., New York, N.Y.) (3 stores including Baybrook Mall store which was opened July 1985)	70.0
Deerbrook and Willowbrook stores. Combined volume: (A Galleria store will be opened in 1986.)	100.0+
Marshall Field (Marshall Field, Chicago, Ill.)	
Town & Country	13.0
Galleria	34.0
Mervyn's (Mervyn's, Hayward, Calif.) (9 Houston area stores)	158.0
Montgomery Ward (Montgomery Ward, Chicago, Ill.)	
9 Houston area stores (3 stores were closed in 1986.)	170.0
Neiman-Marcus (Neiman Marcus, Dallas, Tex.) (2 stores)	85.0
Galleria	65.0
Town & Country	20.0
Palais Royal (27 specialty stores)	110.0
J.C. Penney (J.C. Penney, New York, N.Y.) (8 stores)	136.0
Sakowitz (17 stores plus boutiques)	120.0
(Sakowitz filed for Chapter 11 protection from creditors in August 1985. Stores in Dallas, Amarillo, Midland and Scottsdale, as well as Houston, were closed or sold, reducing the store count from 17 units to four in Houston plus two boutiques. 1986 volume is estimated at $30 million.)	
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.)	
West Oaks Mall	14.0
Saks Center of Fashion	26.0
Sears, Roebuck (Sears, Roebuck, Chicago, Ill.) (9 stores)	295.0
San Antonio	
Dillard's (Division of Dillard Department Stores, Little Rock, Ark.) (22 stores: N.M. 3, Tex. 19)	not available
Frost Brothers (Manhattan Industries, New York, N.Y.) (13 spec. stores: Tex. 12, Mass. 1 Gucci store) (Sold in 1986 to the Wyly Collection, New York, N.Y.)	121.0
LaFeria Dept. Store (6 jr. dept. stores in Tex.)	17.0
(Saks Fifth Ave. opened a store in the North Star Mall, San Antonio, in November 1985. A Marshall Field store will be opened in San Antonio in October 1986 which is expected to reach a volume of $20 million in its first full year.)	
Wichita Falls	
McClurkan's Dept. Store (2 gen. mdse. stores in Tex.)	10.0

DEPARTMENT/APPAREL SPECIALTY STORE SALES

	APPROX. SALES (Millions of $)
SOUTH	
VIRGINIA	
Arlington	
Morton's (6 spec. stores: D.C. 3, Md. 3)	$ 10.0
Martinsville	
Globman's, Inc. (9 jr. dept. stores: N.C. & Va.)	10.0
Newport News	
Virginia Specialty Stores (95 stores)	30.0
Norfolk	
Hess's (Hess's Department Stores, Allentown, Pa.) (5 stores aquired from Rices Nachmans in 1985)	22.0
Smith & Welton (9 jr. dept. stores)	16.1
Richmond	
Miller & Rhoads (Allied Stores Corp., New York, N.Y.) (21 dept. stores: N.C. 5, Va. 16)	139.1
Thalhimer Bros., Inc. (Carter Hawley Hale Stores, Los Angeles, Calif.) (25 dept. stores: N.C. 9, S.C. 1, Tenn. 1, Va. 14)	335.0
Sandston	
Sternheimer Brothers (37 specialty stores)	18.0
Lawrenceville	
W.S. Peebles & Co. (40 stores in Del., Md., N.C., S.C., Va.)	81.6
WEST VIRGINIA	
Wheeling	
Stone & Thomas, Inc. (18 dept. stores in West Va. and Ohio)	100.0+
WEST	
ARIZONA	
Douglas	
Phelps Dodge Mercantile Co. (6 gen. mdse. stores in Ariz.)	49.0
Flagstaff	
Babbitt Bros. Trading Co. (9 gen. mdse. stores in Ariz.)	13.0
Mesa/Tempe/Scottsdale/Phoenix	
Broadway-Southwest, Mesa (Carter Hawley Hale, Los Angeles, Calif.) (13 dept. stores: Ariz. 7, Colo. 3, Nev. 2, N.M. 1) (3rd Denver-area store opened at Westminister Mall in Oct. 1986.)	195.0
Dillard's Phoenix, Div. (Dillard Dept. Stores, Little Rock, Ark.) (13 dept. stores: Ariz. 10, Nev. 3)	not available
Goldwater's, Scottsdale, Ariz. (9 dept. stores: Ariz. 7, Nev. 1, N.M. 1)	135.0
Switzers, Phoenix (15 specialty stores)	10.0

DEPARTMENT/APPAREL SPECIALTY STORE SALES

WEST	APPROX. SALES (Millions of $)
CALIFORNIA	
Anaheim	
The Clothestime (235 men's/women's specialty stores) primarily in western U.S.	$ 126.9
Bakersfield	
Brock's Dept. Store (2 dept. stores)	17.0
Carson	
The Boston Stores, Inc. (19 spec. stores in Ariz. and Calif.)	32.0
Fresno	
E. Gottschalk & Co. (9 dept. stores in Calif. incl. The Fair. Also operates Bobbie West and Village East specialty Shops)	113.0
Hollywood	
Frederick's of Hollywood (14 spec. stores in 33 states)	45.5
Lafayette	
McCaulos (9 jr. dept. stores)	22.0
Los Angeles/Long Beach Area	
Benos (50 specialty stores in Calif.)	34.0
Bonwit Teller (Bonwit Teller, New York, N.Y.)	
Beverly Hills (To be closed in Jan. 1987)	10.0
Palm Desert (To be sold to Bullocks Wilshire)	8.5
Broadway-Southern California (Carter Hawley Hale, Los Angeles Calif.) (43 dept. stores in Calif.)	996.0
(Escondido Plaza store opened in Feb. 1986. A store in the South Coast Plaza, Costa Mesa, which is the new flagship store, was opened October 1986. A volume of $40 million is expected the first year.)	
Buffum's Inc., Long Beach (David Jones California, Inc.) (15 jr. dept. stores, 4 spec. stores)	109.0
Bullock's Southern California (Federated Dept. Stores, Cincinnati, Oh.) (21 dept. stores: Ariz. 1, Calif. 19, Nev. 1, and 6 Bullock's Wilshire spec. stores in Calif.)	
Total, all stores:	712.3
Department store total:	625.0
(Bullock's is remodeling over 15 units in 1986-1987. A store in Seventh Market Place, Citicorp, L.A. was opened in August 1986. It is expected to generate sales of $18 million in its first year.)	
May Co. California, North Hollywood (May Dept. Stores Co., St. Louis, Mo.) (35 Calif. dept. stores)	784.2
(A replacement store was opened May 1986 in Seventh Market Place, Citicorp, L.A. It is expected to reach a volume of $21 million in its first year.)	
Nordstrom (Nordstrom, Inc. Seattle, Wash.) (11 Southern Calif. spec. stores)	470.0
Estimated sales of specified L.A. area stores, 1985:	
South Coast Plaza, Orange County	70.0
Glendale Galleria, Glendale	48.0
Topanga Plaza, Los Angeles County	38.0
J.W. Robinson (Associated Dry Goods, N.Y., N.Y.) (23 Cal. stores)	580.0
(Opened its 24th store, in South Coast Plaza, Costa Mesa, Oct. 1986. It is expected to reach an annual rate of $40 million in its 1st year.)	
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (6 Calif. spec. stores)	100.0+

DEPARTMENT/APPAREL SPECIALTY STORE SALES

WEST

CALIFORNIA

Sacramento	APPROX. SALES (Millions of $)
Weinstock's (Carter Hawley Hale Stores, Inc., Los Angeles, Calif.) (12 dept. stores: Calif. 8, Nev. 1, Utah 3)	$ 230.0

Salinas	
Dick Bruhn (16 specialty stores)	17.0

San Bernadino	
Harris (Corte Ingles Elsa) (5 gen. mdse. stores in Calif.)	50.0+

San Diego	
Nordstrom's (Nordstrom, Inc., Seattle, Wash.) Fashion Valley store	55.0
Walker Scott Co. (Desmond's & Associates, Los Angeles, Calif.) (8 gen. mdse. stores in Calif.)	42.0
(Six of the eight stores are to be closed by February 1987; remaining stores are in Palm Springs and Escondido.)	

San Francisco/Oakland/Palo Alto	
Emporium Capwell (Carter Hawley Hale, Los Angeles, Calif.) (22 dept. stores in Ca.)	690.0
San Jose (5 stores)	138.0
Stanford Shopping Center	46.0
Valley Fair	66.0
Grodin's (Cro America) (36 specialty stores) (To be closed in 1987.)	40.0
Macy's California (R.H. Macy, New York, N.Y.) (25 dept. stores in Calif.)	1,162.6
San Jose (5 stores)	225.0
Union Square, San Francisco (expect volume to reach $200 mil. in 1986)	174.0
I. Magnin (Federated Dept. Stores, Cincinnati, Oh.) (26 spec. stores: Ariz. 1, Calif. 19, Ill. 3, Md. 1, Ore. 1, Wash. 1)	319.0
Mervyn's, Hayward (148 apparel specialty stores)	2,527.0
Nordstrom (Nordstrom Inc., Seattle, Wash.)	
Walnut Creek	37.0
(It is reported that Nordstrom plans to build its largest store in San Francisco Center, Calif.)	
Wilkes Bashford, San Francisco (1 specialty store)	12.0
(Will open a new flagship store in 1986. Expect first year volume to reach $12 million. Four Wilkes Sport Stores will be opened in 1986-87.)	

Santa Monica	
H.C. Henshey Co. (2 gen. mdse. stores in Calif.)	10.0

DEPARTMENT/APPAREL SPECIALTY STORE SALES

WEST	APPROX. SALES (Millions of $)
CALIFORNIA	
Stanford	
Nordstrom's (Nordstrom Inc., Seattle, Wash.) Stanford Shopping Center	$ 46.0
Van Nuys	
Judy's (90 specialty stores including 23 men's wear stores)	56.7
Watsonville	
Charles Ford Co. (6 dept. stores and 5 spec. stores in Calif.)	28.0
Whittier	
Henshaw's Dept. Stores, Inc. (2 dept. stores in Ca.)	28.0
COLORADO	
Aurora	
Fashion Bar (77 specialty stores)	110.0
Denver	
Denver Dry Goods Co. (The Denver) (Associated Dry Goods, New York, N.Y.) (12 dept. stores in Colo.)	154.0
Joslin's, Englewood (Mercantile Stores, New York, N.Y.) (10 dept. stores: Colo. 9, Wyo. 1)	200.0+
May D & F (May Dept. Stores, Denver Colo.)(11 Colo. dept. stores) (The University Hills, Southwest Plaza and Citadel stores each have a volume of from $15 to $22 million. The downtown store was closed, and a new store at Westminister Mall was opened in October 1986.)	171.9
HAWAII	
Honolulu	
Liberty House (Amfac, San Francisco, Calif.) (48 stores in the retail division, including 39 specialty stores and 9 dept. stores)	228.6
Department store total	150.0
IDAHO	
Pocatello	
Block's (11 stores in Idaho and Utah) (To be closed in 1986)	11.0
MONTANA	
Billings	
Hennessey's (including Glass Block, Duluth, and de Lendrecies, Fargo, N.D.) (Mercantile Stores, New York, N.Y.)	65.0

DEPARTMENT/APPAREL SPECIALTY STORE SALES

WEST

	APPROX. SALES (Millions of $)
OREGON	
Eugene	
Emporium Inc. (13 gen. mdse. stores: Ore. 12, Wash. 1)	$ 60.0
Portland	
Meier & Frank (May Dept. Stores Co., St. Louis, Mo.) (7 dept. stores: Ore. 6, Wash. 1)	212.2
(A Medford, Ore. store is to be opened in the fall of 1986.)	
UTAH	
Salt Lake City	
ZCMI Department Store (Zion's Co-Operative Mercantile Institution) (10 dept. stores: Id. 2, Ut. 8)	164.8
(A Sandy, Utah store was opened in Aug. 1986)	
WASHINGTON	
Seattle	
The Bon (Allied Stores, New York, N.Y.) (39 stores: Id. 7, Mont. 3, Ore. 6, Utah 3, Wash. 19)	486.0
Frederick & Nelson (sold by Batus Inc. to Frederick & Nelson Acquisition Corp. in Sept. 1986). (15 dept. stores: Ore. 7, Wash. 8)	225.9
Washington total	183.3
Downtown Seattle	66.3
Bellevue Square	38.0
Oregon Total	42.6
Downtown Portland (to be replaced)	8.5
Washinton Square	15.6
(Two Frederick & Nelson stores -- in Portland and in Salem, Ore. -- were closed in Oct. 1986)	
Lamonts (Pay'n Save Corp., Seattle) (27 specialty stores)	136.0
Nordstrom Inc. (44 specialty stores in Calif., Wash.)	1,301.9
Downtown Seattle	65.0
Bellevue Square, Wash.	55.0
Northgate, Wash.	38.0
South Center, Wash.	37.0
(Also see California listings. In 1986, Nordstrom opened stores in Costa Mesa, Montclair and Escondido, Calif., and in Tyson's Corner, Va.)	
Spokane	
The Crescent (Batus Inc., New York, N.Y.) (3 stores in Wash.)	45.4
Downtown Spokane	25.2
Northtown	10.5
University City	9.8
(Batus has announced plans to sell The Crescent)	

II. DEPARTMENT STORE VOLUME LEADERS

Following is a listing of leading traditional department stores, showing the most recent buying or divisional headquarter location and the best available information on sales for the year 1985 (or closest fiscal period) attributed to each headquarter operation. The volume figures cover sales of all stores (confined to department stores where possible) operated by the listed store. Not included in this compilation are department store operations that were discontinued in 1985-1986 (such as Gimbels). Also not included are national chains (such as Sears), promotional chains, and discount houses (see section on MAJOR CONGOMERATES & CHAINS).

STORES WITH TOTAL SALES OF $100 MILLION OR MORE

	SALES VOLUME (Millions of $)
Dillard Department Stores, Little Rock, Ark. (101 stores operated through five divisions: Little Rock, St. Louis, San Antonio, Fort Worth, Phoenix--individual figures are not available)	$ 1,601.4
Dayton Hudson Department Stores, Minneapolis, Minn. (Dayton Hudson Corp.) (37 stores)	1,447.9
Macy's New York, New York, N.Y. (22 stores)	1,335.7
Macy's New Jersey (formerly Bamberger's), Newark, N.J. (24 stores)	1,258.0
Macy's California, San Francisco, Ca. (25 stores)	1,162.6
Broadway-Southern California, Los Angeles, Ca. (Carter Hawley Hale) (43 stores)	996.0
Bloomingdale's, New York, N.Y. (Federated) (14 stores)	955.2
Lazarus, Columbus, Oh. (Federated) (31 stores)	856.2
Marshall Field, Chicago, Ill. (Batus) (21 stores)	790.0
May Co., California, Los Angeles, Ca. (May Department Stores) (35 stores)	784.2
Abraham & Straus, Brooklyn, N.Y. (Federated) (15 stores)	767.5
Lord & Taylor, New York, N.Y. (Associated Dry Goods) (44 stores)	760.0
Burdine's, Miami, Fla. (Federated) (29 stores)	757.5
Emporium Capwell, San Francisco, Ca. (Carter Hawley Hale) (22 stores)	690.0
Foley's, Houston, Tex. (Federated) (17 stores)	680.3
Rich's, Atlanta, Ga. (Federated) (17 stores)	647.0
Bullock's, Los Angeles, Ca. (Federated) (21 department stores; does not include Bullock's Wilshire spec. stores)	625.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH TOTAL SALES OF $100 MILLION OR MORE (continued)

	SALES VOLUME (Millions of $)
Macy's Atlanta, Atlanta, Ga. (26 stores)	$ 612.1
J.W. Robinson Co., Los Angeles, Ca. (Associated Dry Goods) (23 stores)	580.0
Hecht's, Washington, D.C. (May Department Stores) (23 stores)	567.8
Jordan Marsh-New England, Boston, Mass. (Allied) (18 stores)	546.7
The Bon, Seattle, Wash. (Allied) (39 stores)	486.0
Woodward & Lothrop, Washington, D.C. (17 stores)	470.4
Famous Barr, St. Louis, Mo. (May Department Stores) (17 stores)	460.5
John Wanamaker, Philadelphia, Pa. (Woodward & Lothrop) (16 stores)	450.8
Sanger Harris, Dallas, Tex. (Federated) (16 stores)	450.7
L.S. Ayres, Indianapolis, Ind. (Associated Dry Goods) (25 stores)	430.0
Stern's, Paramus, N.J. (Allied) (17 stores)	425.2
Kaufmann's, Pittsburgh, Pa. (May Department Stores) (18 stores)	423.9
P.A. Bergner, Milwaukee, Wis. (33 stores)	410.0
Carson Pirie Scott & Co., Chicago, Ill. (Department store division - 20 stores)	400.4
Joske's, Dallas, Tex. (Allied) (27 stores)	392.2
Strawbridge & Clothier, Philadelphia, Pa. (Allied) (12 stores)	379.9
Filene's, Boston, Mass. (Federated) (16 stores, not including separate Basement Division)	353.5
Maas Bros., Tampa, Fla. (Allied) (21 stores)	339.3
Thalhimer's, Richmond, Va. (Carter Hawley Hale) (25 stores)	335.0
Hess's, Allentown, Pa. (Crown American Corp.) (39 stores)	330.7

DEPARTMENT STORE VOLUME LEADERS

STORES WITH TOTAL SALES OF $100 MILLION OR MORE (continued)

	SALES VOLUME (Millions of $)
McAlpin's, Cincinnati, Oh. (Mercantile) (9 stores)	$ 325.0
C.J. Gayfer, Mobile, Ala. (Mercantile) (12 stores)	315.0
Kohl's, Brookfield, Wis. (39 stores)	300.0
Higbee's, Cleveland, Oh. (11 stores)	280.8
Jacobson Stores, Jackson, Mich. (20 stores)	275.0
D.H. Holmes, New Orleans, La. (18 stores)	272.8
Jordan Marsh-Florida, Miami, Fla. (Allied) (16 stores)	262.9
Boscov's, Reading, Pa. (11 stores)	250.0
The May Co., Cleveland, Oh. (May Department Stores) (10 stores)	238.6
B. Altman, New York, N.Y. (7 stores)	230.0
Weinstock's, Sacramento, Ca. (Carter Hawley Hale) (12 stores)	230.0
Frederick & Nelson, Seattle, Wash. (15 stores)	225.9
Elder-Beerman, Dayton, Oh. (Department Store Division - 25 stores)	220.9
G.Fox, Hartford, Conn. (May Department Stores) (8 stores)	219.1
Goudchaux/Maison Blanche, Baton Rouge, La. (7 stores)	216.5
Meier & Frank, Portland, Ore. (May Department Stores) (7 stores)	212.2
Joseph Horne, Pittsburgh, Pa. (15 stores)	209.0
JByron's, Miami, Fla. (Amcena Corp.) (49 stores)	200.0+
Joslin's, Englewood, Co. (Mercantile) (10 stores)	200.0+
Castner Knott, Nashville, Tenn. (Mercantile) (11 stores)	200.0
McRae's, Jackson, Miss. (15 stores)	199.8
Richman-Gordman Stores, Omaha, Neb. (12 stores)	197.0
Broadway-Southwest, Mesa, Ariz. (Carter Hawley Hale) (13 stores)	195.0
The Jones Store Co., Kansas City, Mo. (Mercantile) (7 stores)	195.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH TOTAL SALES OF $100 MILLION OR MORE (continued)

	SALES VOLUME (Millions of $)
Younkers, Des Moines, Ia. (Equitable of Iowa) (26 stores)	$ 181.0
Sibley's, Rochester, N.Y. (Associated Dry Goods) (14 stores)	180.0
The M. O'Neil Co., Akron, Oh. (May Department Stores) (10 stores)	175.4
May D & F, Denver, Co. (May Department Stores) (11 stores)	171.9
Goldsmith's, Memphis, Tenn (Federated) (6 stores)	169.1
ZCMI (Zion's Co-operative Mercantile Institution), Salt Lake City, Ut. (10 stores)	164.8
Wieboldt Stores, Chicago, Ill. (12 stores)	160.1
Donaldson's, Minneapolis, Minn. (Allied) (15 stores)	156.8
Denver Dry Goods, Denver, Co. (Associated Dry Goods) (12 stores)	154.0
Gayfer's/Montgomery Fair, Montgomery, Ala. (Mercantile) (6 stores)	150.0
J. Bacon, Louisville, Ky. (Mercantile) (7 stores)	150.0
Liberty House Hawaii, Honolulu, Hi. (Amfac) (9 stores)	150.0
Ivey's-Carolinas, Charlotte, N.C. (Batus) (13 stores)	140.0
Jerry's Department Stores, Salem, Mass. (16 stores)	140.0
Prange's, Green Bay, Wis. (20 stores)	140.0
Miller & Rhoads, Richmond, Va. (Allied) (21 stores)	139.1
Goldwater's, Scottsdale, Ariz. (Associated Dry Goods) (9 stores)	135.0
Hahne & Co., Newark, N.J. (Associated Dry Goods) (9 stores)	130.0
J.B. White, Augusta, Ga. (Mercantile) (7 stores)	130.0
Robinson's of Florida, St. Petersburg, Fla. (Associated Dry Goods) (9 stores)	115.0
Adam, Meldrum & Anderson, Buffalo, N.Y. (10 stores)	113.0
E. Gottschalk, Fresno, Ca. (9 stores)	113.0
Ivey's-Florida, Winter Park, Fla. (Batus) (11 stores)	110.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH TOTAL SALES OF $100 MILLION OR MORE (continued)

	SALES VOLUME (Millions of $)
The Lion Dry Goods Co., Toledo, Oh. (Mercantile) (3 stores)	$ 110.0
Read's, Bridgeport, Conn. (Allied) (6 stores)	107.6
Buffum's, Long Beach, Ca. (15 stores)	109.0
Hutzler's, Baltimore, Md. (10 stores)	107.0
Crowley's, Detroit, Mich. (10 stores)	104.1
Stone & Thomas, Wheeling, West Va. (18 stores)	100.0+
J. L. Brandeis, Omaha, Neb. (10 stores)	100.0
Pizitz, Birmingham, Ala. (12 stores)	100.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $50 MILLION TO $99 MILLION

	SALES VOLUME (Millions of $)
Millers, Knoxville, Tenn. (Allied) (13 stores)	$ 99.7
Strouss, Youngstown, Oh. (May Department Stores) (7 stores)	95.0
Block's, Indianapolis, Ind. (Allied) (11 stores)	90.6
Pomeroy's, Levittown, Pa. (Allied) (8 stores)	90.0
W.S. Peebles, Lawrenceville, Va. (40 stores)	81.6
Mays, Brooklyn, N.Y. (4 stores)	81.4
Herberger's, St. Cloud, Minn. (28 stores)	78.0
S. Grumbacher, York, Pa. (24 stores)	75.0
May-Cohens, Jacksonville, Fla. (6 stores)	73.5
Sage-Allen, Hartford, Conn. (13 stores)	71.1
Albert Steiger, Springfield, Mass. (8 stores)	70.0
Hennessey's, Billings, Mont. (Mercantile) (5 stores)	65.0
Pomeroy's, Harrisburg, Pa. (Allied) (7 stores)	65.0
Cain-Sloan, Nashville, Tenn. (Allied) (4 stores)	62.0
McCurdy, Rochester, N.Y. (7 stores)	60.0
Harris, San Bernardino, Ca. (5 stores)	50.0+
Petersen-Harned-Von Maur, Davenport, Ia. (10 stores)	50.0+

III. APPAREL/GENERAL MERCHANDISE STORE CONGLOMERATES & CHAINS: TOTAL SALES OF PARENT COMPANIES

The following companies have major positions in general merchandise/apparel retailing--including the operation of department stores (traditional and discount), apparel specialty stores and catalog operations. The component divisions, etc., operate under different names. Where available, sales of these component operations are included in the preceding section, covering headquarter operations of department and specialty stores listed by city.

In addition, many of the major operators are engaged in nonrelated activities, including the operation of supermarkets or of specialized hard goods outlets, manufacturing, wholesaling or diverse activities such as the operation of auto repair shops. Unless otherwise specified the sales volumes reported below are total net sales covering all operations, and are for the latest fiscal period or calendar year 1985. Where available, sales figures are included for operations not separately listed in the foregoing section (City Listings) which are owned by the major multi-store groups.

Retail Chain	SALES (Millions of $)
Allied Stores Corp., New York, N.Y. (Acquired by the Campeau Corp. in November 1986). In additon to department store operations listed in the first section of this report, Allied operates specialty stores: Brooks Brothers: estimated volume $231 million; Ann Taylor: $148 million.	$4,135.0
Amcena Corp., New York, N.Y.	620.0
Ames Department Stores, Inc., Rocky Hill, Conn. (Including G.C. Murphy which was acquired in 1985)	1,512.7
Amfac, Inc., San Francisco, Calif. (Including Liberty House of Hawaii, with a volume of $228.6 million and Village Fashion off-price stores, $31.8 million.)	2,405.4
Associated Dry Goods Corp., New York, N.Y. (Acquired by May Dept. Stores Co. in October 1986). Includes 109 Caldor stores and 93 Loehmann's with a combined volume of $1.7 billion and 248 department stores with a combined volume of $2.7 billion).	4,385.0
Banks, Joseph A., Clothiers (Quaker Oats, Chicago, Ill.), Baltimore Md. (32 stores plus mfg. operations. To be sold to a group of investors.)	110.0
Batus Inc., New York, N.Y. Retail Divisions: In July 1986, Batus put up for sale 93 of its 268 stores. Stores to be retained include Saks Fifth Avenue, Marshall Field's, and Ivey's-Carolinas)	2,175.0
L.L. Bean, Freeport, Me.	304.0
Belk Stores, Charlotte, N.C. (352 department stores)	1,500.0
Benetton, New York, N.Y. (400 affiliated but operator-owned specialty stores)	320.0
Bradlees, Braintree, Mass. (Division of The Stop & Shop Companies) (158 discount dept. stores. In 1985, 18 Jefferson Ward stores were acquired, of which 16 were changed to Bradlees).	1,620.1
Brooks Fashion Stores, New York, N.Y. (787 stores) (Dylex Ltd., Toronto, Canada)	525.0
Brown Group, Inc., St. Louis, Mo. Specialty Stores: (includes Meis Dept. Stores, 10 Family Fashion Stores in the Midwest)	325.8
Carson Pirie Scott & Co., Chicago, Ill. (Retail group volume: $705.8 million; department store volume: $400.4 million)	1,301.9

APPAREL/GENERAL MERCHANDISE STORE CONGLOMERATES & CHAINS: TOTAL SALES OF PARENT COMPANIES
(continued)

Retail Chain	SALES (Millions of $)
Carter Hawley Hale Stores, Inc., Los Angeles, Ca. (Department store division sales: $2.9 billion; specialty store sales: $1.1 billion, including 162 Contempo Casuals with sales of $100-$110 million)	$3,977.9
(Has agreed to sell its John Wanamaker 16-store operation to Woodward & Lothrop, Wash. D.C.) (Announced restructuring plan in December 1986 that will split the present company into two publicly traded companies--one will operate its department stores and the other its specialty stores.)	
Danners, Inc., Indianapolis, Ind. (35 3D discount dept. stores)	171.3
Dayton Hudson Corp., Minneapolis, Minn. (Includes sales of 148 Mervyn's, $2.5 billion; 226 Target Stores, $3.9 billion; the dept. store division's 37 stores, $1.4 billion)	8,793.4
Dillard Department Stores, Inc., Little Rock, Ark. (101 stores operated through five divisions: Little Rock, Ark.: 19 stores; St. Louis, Mo. 11; San Antonio, Tex.: 23; Fort Worth, Tex.: 35; Phoenix, Ariz.: 13. In 1986 Dillard completed the purchase of 12 Kans. and Mo. department stores from R.H. Macy & Co. (Macy's Atlanta). (Two stores (Overland Park, Kan., Independence, Mo.) were sold by Dillard to Mercantile Stores to be operated as units of The Jones Store Co., Kansas City; the remainder have been converted to Dillard's stores.)	1,601.4
Dollar General Corp., Scottsville, Ky. (1,278 stores in 23 states)	584.4
Dress Barn, Inc., Stamford, Conn. (208 stores)	135.8
The Dunlap Co., Fort Worth, Tex. (Also operates Striplings & Co., Fort Worth)	110.0
Edison Bros. Stores, Inc., St. Louis, Mo. (Apparel specialty store division sales: $280.6 million)	808.3
Elder-Beerman Stores Corp., Dayton, Oh. (25 department stores in Ohio and Indiana plus apparel specialty stores. Two department stores were added in 1986)	352.2
Evans, Inc., Chicago, Ill. (25 fur shops and leased departments in 13 major department stores.)	147.6
Family Dollar Stores, Inc., Charlotte, N.C. (920 discount stores)	410.1
Federated Department Stores, Inc., Cincinnati, Oh. (Department store division sales in 217 stores: $6.7 billion. Specialty store operations include The Children's Place, 158 stores: volume $158.7 million; Filene's Basement, 17 stores: $212.8 million; Mass Merchandisers: Gold Circle, 76 stores: $1.1 billion.)	8,164.4
Gap Stores, Inc., San Bruno, Ca. (613 Gap Stores and 35 Banana Republics)	647.3
General Mills Inc., Minneapolis, Minn. (Including 39 Eddie Bauer stores in the U.S. and Canada, with sales totaling $172 million; The Talbots, 84 stores, $224 million in sales.) Specialty Retailing Group sales total:	474.3
Glosser Brothers, Inc., Johnstown, Pa. (Includes Gee Bee discount stores as well as grocery stores)	280.0
W.R. Grace & Co., New York, N.Y. (Includes Herman's World of Sporting Goods, 131 stores with sales amounting to $420 million and Berman's Leather Apparel stores, with sales of $155 million and others) Specialty store total: In 1986, Herman's was sold to The Dee Corp., a British food retailing group.)	673.0

APPAREL/GENERAL MERCHANDISE STORE CONGLOMERATES & CHAINS: TOTAL SALES OF PARENT COMPANIES

(continued)

Retail Chain	SALES (Millions of $)
Hartmarx Corp., Chicago, Ill. (253 Hartmarx specialty stores, 127 Kuppenheimer stores, 69 Country Miss stores, 18 Jaymar/Sansabelt Shops. Also Wallachs stores with an estimated volume of $90 million and other specialty stores. Retail Store Total: $	634.0
Heck's, Inc., Nitro, W.Va. (131 discount department stores in Mid-Atlantic and Mid-West States, 35 Maloney's Stores) (Acquired by Toussie-Viner, a N.Y. investment group in Oct. 1986.)	523.3
Interco, Inc. St. Louis, Mo. General Retailing Merchandising Group:	461.8
Jamesway Corp., Secaucus, N.J. (91 stores in N.Y., N.J. and Pa.)	523.1
K mart Corp., Troy, Mich. (Plans to divest Designer Depot, its 79 unit off-price apparel chain by Feb. 1987) (Operates a total of 2,332 general merchandise and 1,516 specialty retail stores)	22,420.0
Kline Bros. Co., New York, N.Y. (24 Kline Bros. Dept. Stores, and Katz Department stores)	69.0
The Limited Stores, Inc., Columbus, Oh. (Operates 2,570 stores)	2,387.1
R.H. Macy & Co., Inc., New York, N.Y. (Taken over by a management group, Macy Acquiring Corp., in June 1986)	4,368.4
Manhattan Industries, Inc., New York, N.Y. Specialty Store sales:	170.2
May Department Stores, St. Louis, Mo. (Department store division sales: $3,327.1 million. Acquired Associated Dry Goods Corp., New York, N.Y. in October 1986)	5,027.6
McCrory Stores Corp., New York, N.Y. (Rapid American Corp., New York, N.Y.) (720 stores. Acquired T.G.& Y. Stores, Oklahoma City, Okla. in Jan. 1986 from an investment group.)	984.0
Melville Corp., Harrison, N.Y. (Including Marshall's, $1.3 billion in sales; Chess King: $206.0 million) (Sold Foxmore to BR Investors in 1986) Apparel specialty store total:	1,614.0
Mercantile Stores Co., Wilmington, Del. (80 stores in 13 store groups)	1,880.0
Montgomery Ward, Chicago, Ill. (Mobil Corp.) (Catalog operations have been discontinued. Jefferson Ward discount chain closed as well as 20 Montgomery Ward stores. Most of the remaining stores are to be converted to specialty stores)	6,073.0
S.E. Nichols, Inc., New York, N.Y. (44 discount dept. stores in Mid-Atlantic states)	284.8
Oshman's Sporting Goods, Inc., Houston, Tex. (Including 25 Abercrombie & Fitch stores)	312.3
Petrie Stores Corp., Secaucus, N.J. (Including Winkelman's, Miller-Wohl chain as well as interest in Paul Harris Stores and Toys "R" Us. Bought 32 stores in Puerto Rico from The Limited in 1986)	1,160.8
H.C. Prange Co., Sheboygan, Wis. (Including Prangeway Discount Store sales)	298.0

APPAREL/GENERAL MERCHANDISE STORE CONGLOMERATES & CHAINS: TOTAL SALES OF PARENT COMPANIES
(continued)

Retail Chain	SALES (Millions of $)
Rose's Stores, Inc., Henderson, N.C. (204 discount stores in 13 southeastern states)	$ 1,009.2
Ross Stores, Inc., Newark, Ca. (107 off-price chain stores)	375.9
SCOA Industries, Inc., Columbus, Oh. (Includes 126 Hills Department Stores)	1,213.7
Salkin & Linoff, Inc., Minneapolis, Minn. (326 specialty stores and leased departments in Minn. operating under various names)	100.0
Schottenstein's Stores Corp., Columbus, Ohio (Owns Value City and Union Co., Columbus, Ohio)	425.0
Shopko Stores, Inc., Green Bay, Wis. (Division of Super Valu Stores) (59 stores in 7 Midwestern States)	754.0
Sprouse-Reitz Co., Inc., Portland, Ore. (Operates 322 general merchandise stores in the south and southwest)	202.8
Strawbridge & Clothier, Philadelphia, Pa. (Including sales of 20 discount Clover Stores with volume amounting to $307 million.)	686.9
Syms, Lyndhurst, N.J. (15 discount apparel stores in N.Y. and Chicago areas)	215.2
Toys "R" Us, Rochelle Park, N.J. (Also includes 23 Kids "R" Us stores)	1,976.1
U.S. Shoe Corp., Cincinnati, Oh. (Includes Casual Corner, 720 women's specialty stores with sales of more than $500 million) Apparel specialty store division total:	1,091.7
Wal-Mart Stores, Inc., Bentonville, Ark. (Including Sam's Wholesale Clubs with sales of $775 million)	8,451.5
Wickes Companies, Inc., San Diego, Ca. Apparel Specialty Store sales total: (Plans to sell most of its retailing operations, including Woman's World (178 stores), Mode O'Day, Howard Brand Discount Stores, Red Owl Stores and others)	700.0
F.W. Woolworth Co., New York, N.Y. (U.S. Woolworth's volume: $1,943 million; Richman Bros.: $254 million; Little Folks Shop, $101 million) Total, all U.S. operations:	3,884.0
Zayre Corp., Framingham, Mass. (337 Zayre discount stores with sales of $2.6 billion. The off-price division -- 191 T.J. Maxx stores, and 428 Hit-or-Miss stores -- had combined sales of $1.1 billion) Total, all operations:	4,036.0

IV. TRADITIONAL DEPARTMENT STORES AND APPAREL SPECIALTY STORES OPERATED BY CONGLOMERATE CORPORATIONS

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Allied Stores Corporation (acquired by the Campeau Corp. in Nov. 1986)	New York, N.Y.
Ann Taylor	New York, N.Y.
Block's (William H. Block & Co.)	Indianapolis, Ind.
The Bon (Bon Marche)	Seattle, Wash.
Bonwit Teller	New York, N.Y.
Brooks Brothers	New York, N.Y.
Cain-Sloan	Nashville, Tenn.
Catherine's Stout Shoppe	Memphis, Tenn.
Deys	Syracuse, N.Y.
Donaldsons	Minneapolis, Minn.
Garfinckel's	Washington, D.C.
Heer's	Springfield, Mo.
Herpolsheimer's	Muskegon, Mich.
Jerry Leonard	Omaha, Neb.
Jordan Marsh-Florida	Miami, Fla.
Jordan Marsh-New England	Boston, Mass.
Joske's	Dallas, Texas
Levy's (merged into Maas Bros. div.)	Savannah, Ga.
Maas Brothers	Tampa, Fla.
Miller & Rhoads	Richmond, Va.
Millers	Knoxville, Tenn.
Mullers (closed)	Lake Charles, La.
Plymouth	New York, N.Y.
Pomeroy's (includes former Gimbels location in Lancaster, Pa.)	Harrisburg & Levittown, Pa.
Read's	Bridgeport, Conn.
Stern's (includes eight former Gimbels locations)	Paramus, N.J.
Amcena Corporation	New York, N.Y.
Eastern Mountain Sports	Boston, Mass.
JBryron's	Miami, Fla.
Maurice's	Duluth, Minn.
Millers Outpost	Ontario, Calif.
Ohrbach's (to be dissolved)	New York, N.Y.
Uptons	Atlanta, Ga.
The Lodge at Harvard Square (Will add 23 of 28 Howland, Steinbach (Supermarkets General) White Plains, N.Y. stores in 1987).	Newton, Mass.
Amfac, Inc.	San Francisco, Calif.
Liberty House of Hawaii	Honolulu, Ha.
Village Fashions	Philadelphia, Pa.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Associated Dry Goods (acquired by May Dept. Stores Co., Oct. 1986)	New York, N.Y.
L.S. Ayres & Co.	Indianpolis, Ind.
Caldor, Inc.	Norwalk, Conn.
The Denver Dry Goods Co.	Denver, Co.
Goldwaters	Scottsdale, Ariz.
Hahne & Co.	Newark, N.J.
Joseph Horne Co. (agreement reached for sale to a group of Pittsburgh investors by year-end)	Pittsburgh, Pa.
Loehmann's	New York, N.Y.
Lord & Taylor	New York, N.Y.
J.W. Robinson Co.	Los Angeles, Calif.
Robinson's of Florida	St. Petersburg, Fla.
Sibley, Lindsay & Curr Co.	Rochester, N.Y.
Sycamore Specialty Stores	Indianapolis, Ind.
Batus Inc. (Batus Retail Group)	New York, N.Y.
The Crescent (sold to Seattle investment group)	Spokane, Wash.
Frederick & Nelson (sold to Seattle investment group)	Seattle, Wash.
Gimbels-East (some stores sold to Allied, others were closed)	New York, N.Y.
Gimbels-Midwest (some stores converted into Marshall Field stores, others sold to P.A. Bergner)	Milwaukee, Wis.
Gimbels-Pittsburgh (majority of these stores were sold to May Dept. stores)	Pittsburgh, Pa.
Ivey's-Carolinas	Charlotte, N.C.
Ivey's-Florida (both to be consolidated into a single division in Spring 1987)	Orlando, Fla.
Kohl's Department Stores (leveraged buyout by management group)	Brookfield, Wis.
Marshall Field & Co.	Chicago, Ill.
Saks Fifth Avenue	New York, N.Y.
Thimbles	New York, N.Y.
Carson Pirie Scott & Company	Chicago, Ill.
Carson Pirie Scott Department Stores	Chicago, Ill.
County Seat	Chicago, Ill.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Carter Hawley Hale Stores, Inc. (announced plan to spin off specialty stores into a new company)	Los Angeles, Ca.
Bergdorf Goodman Co.	New York, N.Y.
The Broadway-Southern California	Los Angeles, Ca.
The Broadway-Southwest	Phoenix, Ariz.
Contempo Casuals	Los Angeles, Ca.
Emporium Capwell	San Francisco, Ca.
Neiman-Marcus	Dallas, Tex.
Thalhimers	Richmond, Va.
John Wanamaker (to be sold to Woodward and Lothrop)	Philadelphia, Pa.
Weinstock's	Sacramento, Ca.
Crown American	Johnstown, Pa.
Hess's Department Stores	Allentown, Pa.
Dayton Hudson Corp.	Minneapolis, Minn.
Dayton Hudson Department Stores	Minneapolis, Minn.
Mervyn's	Hayward, Ca.
Target	Minneapolis, Minn.
Dylex Limited	Toronto, Ont., Canada
Brooks Fashion Stores	New York, N.Y.
Foxmoor	West Bridgewater, Mass.
The Wet Seal	Irvine, Calif.
Edison Brothers Stores, Inc.	St. Louis, Mo.
Fashion Conspiracy	St. Louis, Mo.
Jeans West/Oak Tree	St. Louis, Mo.
Size 5-7-9 Shops	St. Louis, Mo.
Elder Beerman Stores Corp.	Dayton, Oh.
Elder Beerman Department Stores	Dayton, Oh.
Margo's/Regan's	Dallas, Tex.
Spare Change (merged into Margo's)	Dayton, Oh.
Federated Department Stores, Inc.	Cincinnati, Oh.
Abraham & Straus	Brooklyn, N.Y.
Bloomingdale's	New York, N.Y.
Bullock's	Los Angeles, Calif.
Burdine's	Miami, Fla.
The Children's Place	Pine Brook, N.J.
Filene's	Boston, Mass.
Filene's Basement	Boston, Mass.
*Foley's	Houston, Tex.
Gold Circle (includes Richway stores)	Columbus, Oh.
Goldsmith's	Memphis, Tenn.
Lazarus	Cincinnati, Oh.
I. Magnin	San Francisco, Ca.
MainStreet	Chicago, Ill.
Rich's	Atlanta, Ga.
*Sanger Harris (acquired John A. Brown stores from Dillard in May 1985)	Dallas, Tex.

*It is reported that these two divisions will be merged in 1987.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
General Mills, Inc.	Minneapolis, Minn.
Eddie Bauer	Redmond, Wash.
The Talbots, Inc.	Hingham, Mass.
W.R. Grace (selling its entire retailing group in 1986)	New York, N.Y.
Berman's	Brooklyn Park, Minn.
*Herman's World of Sporting Goods	Cartaret, N.J.
Shepler's	Wichita, Ks.
Hartmarx	Chicago, Ill.
Baskin Clothing Co.	Chicago, Ill.
Ray Beers	Topeka, Ks.
Capper & Capper, Inc.	Detroit, Mich. and Chicago, Ill.
Country Miss Stores	New York, N.Y.
deJong's	Evansville, Ind.
Field Brothers	New York, N.Y.
Hasting's	San Francisco, Ca.
Jack Henry	Kansas City, Mo.
Jaymar/Sansabelt Shops	Michigan City, Ind.
Kleinhans	Buffalo, N.Y.
Klopfenstein's	Seattle, Wash.
Kuppenheimer's	Atlanta, Ga.
Leopold Price & Rolle	Houston, Tex.
Liemandt's	Minneapolis, Minn.
Littler's	Seattle, Wash.
Peer Gordon	Cleveland, Ohio
Porter-Stevens	New Orleans, La.
Root's	Red Bank, N.J.
Silverwoods	Los Angeles, Ca. and Las Vegas, Nev.
Chas. A. Stevens	Chicago, Ill.
F.R. Tripler & Co.	New York, N.Y.
Walkers	Columbus and Dayton, Oh.
Wallachs	New York, N.Y.
Jas. K. Wilson	Dallas, Tex.
Wolf Bros.	Tampa, Fla.
Zachry	Atlanta, Ga.
Interco, Inc.	St. Louis, Mo.
Fine's Men's Shops, Inc.	Norfolk, Va.
Golde's Department Stores	St. Louis, Mo.
Idaho Department Stores Co.	Caldwell, Id.
Sky City Stores, Inc.	Asheville, N.C.
United Shirt Distributors, Inc.	Detroit, Mich.

*W.R. Grace sold its interest in Herman's to the Dee Corp., England.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
The Limited, Inc.	Columbus, Oh.
Henri Bendel	New York, N.Y.
Lane Bryant	New York, N.Y.
Lerner Stores Corp.	New York, N.Y.
Limited Stores	Columbus, Oh.
The Limited Express	Columbus, Oh.
Sizes Unlimited	New York, N.Y.
Victoria's Secret	Columbus, Oh.
R.H. Macy & Co., Inc. (taken private by management in July 1986. Macy Acquiring Corp. is the holding company)	New York, N.Y.
Bamberger's (name changed to Macy's in 1986)	Newark, N.J.
Macy's Atlanta	Atlanta, Ga.
Macy's California	San Francisco, Ca.
Macy's New York	New York, N.Y.
Manhattan Industries	New York, N.Y.
Frost Brothers (sold in July 1986 to the Wyly Collection)	San Antonio, Tex.
Manhattan Factory Outlet	Fairlawn, N.J.
Manhattan Ward, Inc.	Conshohocken, Pa.
The May Department Stores Co. (acquired Associated Dry Goods in Oct. 1986)	St. Louis, Mo.
Famous-Barr Co.	St. Louis, Mo.
G. Fox & Co.	Hartford, Conn.
The Hecht Co.	Washington, D.C.
Kaufmann's (includes former Gimbels-Pittsburgh store locations)	Pittsburgh, Pa.
May-Cohens	Jacksonville, Fla.
The May Co.	Cleveland, Oh.
May Co., California	Los Angeles and San Diego, Ca.
May-D & F	Denver, Co.
Meier & Frank Co.	Portland, Ore.
The M. O'Neil Co.	Akron, Oh.
Strouss (merged into Kaufmann's div.)	Youngstown, Oh.
Melville Corp.	Harrison, N.Y.
Chess King	Worcester, Mass.
Marshall, Inc.	Woburn, Mass.
Wilson's	Los Angeles, Ca.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Mercantile Stores Co., Inc.	Wilmington, Del.
Bacon's	Louisville, Ky.
Castner Knott Co.	Nashville, Tenn.
de Lendrecie's	Fargo, N.D.
Gayfer's	Montgomery and Mobile, Ala.
Glass Block	Duluth, Minn.
Hennessey's	Billings, Mont.
The Jones Store Co.	Kansas City, Mo.
Joslin's	Denver, Co.
Lion	Toledo, Oh.
McAlpin's	Cincinnati, Oh. & Lexington, Ky.
Root's	Terre Haute, Ind.
J.B. White	Augusta, Ga.
Petrie Stores Corp.	Secaucus, N.J.
G & G Shops	New York, N.Y.
Hartfield's	Secaucus, N.J.
Jean Nicole	Secaucus, N.J.
Marianne	Secaucus, N.J.
Petrie's	Secaucus, N.J.
Rave	Secaucus, N.J.
Stuart's	Secaucus, N.J.
Three Sisters	Secaucus, N.J.
Winkelman's	Detroit, Mich.
Phillips-Van Heusen Corp.	New York, N.Y.
Hamburger's	Baltimore, Md.
Harris & Frank	Los Angeles, Ca.
Juster's	Minneapolis, Minn.
Kennedy's	Boston, Ma.
Supermarkets General	Woodbridge, N.J.
Hochschild, Kohn	Baltimore, Md.
Howland Steinbach	White Plains, N.Y.
(23 of 28 Howland Steinbach div. stores were sold in 1986 to Amcena)	
U.S. Shoe Corp.	Cincinnati, Oh.
August Max	New York, N.Y.
Career Images	Enfield, Conn.
Caren Charles	Enfield, Conn.
Casual Corner	Enfield, Conn.
T.H. Mandy	Merrfield, Va.
J. Riggings	Atlanta, Ga.
Petite Sophisticate	Enfield, Conn.
Ups 'n Downs	Enfield, Conn.
F.W. Woolworth Co.	New York, N.Y.
Anderson-Little	Fall River, Mass.
Little Folks Shop	City of Industry, Calif.
Richman	Cleveland, Oh.
Susie's	New York, N.Y.
Woolworth's	New York, N.Y.

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now -- 1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

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THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well as information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

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A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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CONSUMER MARKET DEVELOPMENTS

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CONSUMER MARKET DEVELOPMENTS

TRENDS

Americans have increased their standard of living -- measured by the goods and services consumed by the average American -- at a rate of more than 20% every decade. In the past 35 years, the standard doubled according to a joint report compiled by the U.S. Census Bureau and The Conference Board, an independent business research organization.

The critical factor in the Nation's economic progress involves gains in productivity, i.e. output of the average U.S. worker. Productivity more than doubled in the first half of this century; it more than doubled again in the last 35 years, but the rate of gain slowed due, primarily, to the influx of inexperienced workers (both young people and women). Now this group has been absorbed and the work force is generally more experienced. This, plus technonological advancements and stable prices, hopefully, will stimulate bigger gains in U.S. productivity. However, the productivity rate in 1986 in the nonfarm business sector rose only 0.7% for the year 1986, a little better than the 0.5% gain in 1985. Manufacturing productivity in 1986 was up 2.7% compared with a 4.4% rise in 1985. An improvement, but far below the gains in productivity of the major competitors of the U.S., such as Japan. Leading economists feel that the U.S. may see its standard of living fall if annual overall increases in producivity growth remain below 1% for an extended period of time.

The heavy influx of imports does not do anything much to increase the buying power of the U.S. consumers, and economic growth. The gross national product -- the total value of all goods and services produced in the U.S. -- in 1986 grew at an inflation-adjusted rate of only 2.5%, down from a 2.7% gain in 1985. A 3.2% growth is projected by the White House for 1987; however, the projections of private economists generally range from 2.5% to 3%. A narrowing in the trade deficit due to the falling value of the American dollar, it is hoped, will stimulate growth.

Total consumer spending in 1986 was up an estimated 6.4% compared with 1985 on a current dollar basis, according to preliminary data. A surge in spending in the last months of the year as consumers rushed to buy cars and other durables while deductions on federal tax returns for sales taxes could still be taken. Excluding cars and adjusted for inflation, total retail sales were up an estimated 4.5% in 1986 compared with 1985.

Consumer incomes are not expected to grow as fast in 1987 as they did in 1986, although a cut in the tax rate will add some take-home pay. Generally a gain of around 3% in total sales excluding cars is anticipated. General merchandise sales gains may be above average as consumers switch spending from cars, appliances and furniture. It will not be an easy year, in the view of most retailers who are faced with growing competition in a generally overstored environment and an increasingly fragmented marketplace. Retailers will have to find a special niche in the market that is characterized by many different life styles, needs, and buying patterns.

For the near term, general economic conditions will play a key role in market developments, but in the longer view they will be shaped to an important extent by demographic changes, bringing about major shifts in the composition of the population and of the labor force.

The major implications of demographic change over the rest of this decade are associated with the aging of the population, changes in immigration patterns, and further changes in living arrangements (or the structure of the nation's households). As the baby-boom generation continues to mature, many of the trends associated with its entry into the labor market may reverse as it is replaced by the relatively small baby-bust generation. Improvements in health care is lengthening the average life of the population, further skewing the age distribution toward the elderly.

Over the next few years, the composition of the population will show a growing percentage in the middle (25 to 44) and older (over 65) age groups, with a corresponding decrease in the percentage of young people. The composition of the labor force, employment patterns by occupation, earnings, consumption and saving patterns, all will be affected by coming demographic developments.

Demographic Projections: 1986-1990

Item	Actual, 1980-85	Projected 1986-90
Population growth (annual percentage change)	1.2	.9
Births (per 1,000 population)	15.8	14.5
Deaths (per 1,000 population)	8.7	8.9
Median age (years)	30.6	32.2
Household formations (million per year)	1.2	1.2-1.6
Average household size (persons)	2.7	2.6

Source: U.S. Bureau of the Census
and National Center for Health Statistics.

Marketers are generally favored by a population bulge among adults age 25 to 45, encompassing people in their peak earning and household formation years. But this is far from being a homogeneous target market. It involves many different life styles, income levels and occupations. To a growing extent the U.S. population is undergoing an income polarization. The middle class is growing smaller; bigger percentages of the population are on the high-income and on the low-income scales. With the outlook for faster growth in low-paying jobs rather than high-paying in coming years, this polarization may worsen.

The Census Bureau expects household formations to gradually decline over the rest of the decade, falling from the 1.5 million annual average recorded in the two years ending March 1986 to 1.2 million annually by 1990, based on current household structures. Household growth could be higher -- perhaps 1.6 million annually -- if the past trend toward independent living persists. The size of the average household, in any event, is expected to shrink further because the downtrend in family size will probably continue.

Although economic conditions --notably tax laws and the inflation rate -- will play a key role, homeownership is expected to grow as the baby boom generation continues to mature. But first-time buyers will constitute a smaller share of the single-family market. Upgrading moves will be more common.

The inevitable aging of the population will not only affect living arrangements and the labor market, but consumption and savings patterns. The savings rate may rise as the baby-boomers move out of the freer-spending age brackets. People in their late twenties and thirties tend to spend relatively more on goods than on services; the reverse pattern generally prevails among older consumers. The growth in purchasing power of the elderly and in the number of people living alone will spur expenditures on services. Labor Department projections on employment trends anticipate the fastest growth will be in service-related jobs rather than in the production of goods.

POPULATION TRENDS

The Total U.S. Population

At the start of the year 1987, an estimated 242.1 million people were living in the U.S. This was 15.5 million more than the April 1980 census count and 2.2 million higher than the 1986 New Year's Day figure. The population is projected to grow by 2.2 million during 1987. This compares with a record growth of 3.1 million reported in 1956, when the U.S. population was about 168 million.

The January 1, 1987 estimate by the U.S. Census Bureau is based on estimated 3.7 million births in 1986, 2.1 million deaths, and net migration of 554,000 during the year. The population increased 0.9% in both 1985 and 1986, and 1.0% in each year from 1981 to 1984. In contrast, the annual rate of increase in the peak years of the baby boom (1947-1961) ranged from 1.6% to 1.9%.

As of July 1, 1986, the total population including U.S. Armed Forces overseas,amounted to 241.5 million which was 13.7 million more than the total reported as of July 1, 1980.

Estimates of the Population By Type, as of July 1, 1980-1986
(in thousands)

	Total Population Including Armed Forces Overseas	Resident Population	Civilian Population
1986(r)	241,489	240,941	239,250
1985(r)	239,283	238,740	237,036
1984(r)	237,019	236,495	234,790
1983(r)	234,799	234,284	232,589
1982(r)	232,520	231,996	230,327
1981(r)	230,138	229,637	227,989
1980(r)	227,757	227,255	225,651

(r) revised

Source: U.S. Bureau of the Census, Current Population Reports, Population Estimates and Projections (Series P-25, No. 993)

Population by Age, Sex, Race

Resident U.S. Population By Age, Sex & Race: 1980, 1985
(Numbers in thousands)

	Total					
July 1, 1985	Total	Male	Female	White	Black & Other Races	Black
All ages	238,740	116,161	122,579	202,768	35,972	28,887
Under 5 years	18,037	9,230	8,806	14,636	3,401	2,706
5 to 9 years	16,822	8,608	8,213	13,621	3,201	2,597
10 to 14 years	17,103	8,762	8,340	13,830	3,273	2,655
15 to 19 years	18,551	9,445	9,107	15,194	3,357	2,770
20 to 24 years	20,993	10,515	10,479	17,511	3,483	2,842
25 to 29 years	21,751	10,886	10,865	18,316	3,435	2,749

(continued)

POPULATION TRENDS

Population by Age, Sex, Race

Resident U.S. Population By Age, Sex & Race: 1980, 1985

(Numbers in thousands)
(continued)

	Total				Black &	
July 1, 1985 (continued)	Total	Male	Female	White	Other Races	Black
30 to 34 years	20,267	10,096	10,171	17,158	3,109	2,408
35 to 39 years	17,708	8,741	8,967	15,243	2,465	1,889
40 to 44 years	14,055	6,889	7,166	12,168	1,887	1,442
45 to 49 years	11,648	5,679	5,969	10,046	1,603	1,255
50 to 54 years	10,942	5,281	5,660	9,509	1,433	1,148
55 to 59 years	11,337	5,389	5,957	9,990	1,347	1,101
60 to 64 years	10,997	5,120	5,877	9,804	1,193	982
65 years & over	28,530	11,529	17,002	25,743	2,787	2,343

	Total				Black &	
July 1, 1980	Total	Male	Female	White	Other Races	Black
All ages	227,255	110,427	116,828	195,208	32,047	26,784
Under 5 years	16,458	8,417	8,040	13,493	2,964	2,476
5 to 9 years	16,609	8,495	8,114	13,622	2,987	2,506
10 to 14 years	18,236	9,314	8,923	15,085	3,151	2,685
15 to 19 years	21,380	10,700	10,680	18,112	3,268	2,757
20 to 24 years	20,767	10,147	10,620	17,647	3,120	2,629
25 to 29 years	19,697	9,801	9,896	16,798	2,899	2,365
30 to 34 years	17,754	8,780	8,974	15,313	2,441	1,929
35 to 39 years	14,980	6,921	7,159	12,219	1,861	1,478
40 to 44 years	11,726	5,738	5,988	10,156	1,570	1,265
45 to 49 years	11,048	5,371	5,677	9,649	1,399	1,150
50 to 54 years	11,698	5,618	6,080	10,344	1,355	1,136
55 to 59 years	11,616	5,480	6,136	10,387	1,229	1,046
60 to 64 years	10,145	4,700	5,446	9,128	1,017	878
65 years & over	25,704	10,366	15,338	23,297	2,407	2,106
Median age: Years						
1985	31.5	39.3	32.7	32.4	26.9	26.6
1980	30.0	28.9	31.3	30.9	25.3	24.9

Source: U.S. Bureau of the Census, Current Population Reports: Estimates of the Population of the U.S., By Age, Sex, and Race: 1980-1985 (Series P-25, 985)

POPULATION TRENDS

Age Patterns

The market for products and services for young children in the U.S. will probably never be larger than now. The number of youngsters under five has now reached a high level; however, birth totals are believed to have peaked for the foreseeable future. Due to the low level of births in the 1970's, the teenager and young adult populations are currently below 1980 levels.

Growing fastest since 1980 is the 35-44 age group (up 23.9%). Their share of the total rose from 11.3% to 13.3%. Gains are also noted in the population share held by people over age 64, and this trend will continue.

Age Structure of the Population: July 1, 1985 and April 1, 1980
(Total population including Armed Forces overseas)

	Percent Distribution		Percent Change in Number
	1985	1980	1985/1980
All ages	100.0%	100.0%	+ 5.4%
Under 5 years	7.5	7.2	+ 10.3
5 to 13 years	12.6	13.7	- 3.4
14 to 17 years	6.2	7.2	- 8.5
18 to 24 years	12.0	13.3	- 5.1
25 to 34 years	17.6	16.4	+ 13.3
35 to 44 years	13.3	11.3	+ 23.9
45 to 54 years	9.4	10.0	- 0.9
55 to 64 years	9.3	9.6	+ 2.9
65 to 74 years	7.1	6.9	+ 9.1
75 to 84 years	3.7	3.4	+ 14.2
85 years & over	1.1	1.0	+ 21.0

Source: U.S. Bureau of the Census,
Current Population Reports (Series P-25, 985)

Sex Ratios:

Up until about 30 years of age, males in the U.S. population outnumber females. In 1985, there were 59,954,000 males compared with 58,007,000 females under 31 years of age. Females, however, have a longer life span, on average, and they outnumber males to an increasing extent with advancing age. Among the population age 65 and over, females were almost 60% of the total in 1985; there were about 68 males for every 100 females in this age category. In the total population, there were 95 males for every 100 females.

Race/Color

The nonwhite population in the U.S. is growing at a faster clip than the white due to higher fertility rates and immigration. Overall the resident population in 1985 was up 5.0% compared with 1980. The black population, however registered a 7.8% gain, and races other than Black and White shot up about 35%.

Race/Color (continued)

The Hispanic population (which includes both Blacks and Whites) increased 16%, reaching a total of $16.9 million in 1985 compared with 14.6 million in 1980. This group represented 7.2% of the U.S. total in 1985 compared with 6.4% in 1980. When adjusted for illegal aliens, the size of the Hispanic population (as well as of other minorities) is greater than the official counts.

Type of Spanish Origin of the U.S. Hispanic Population

	1985		1986	
	% of Total Spanish Origin	% of U.S. Total	% of Total Spanish Origin	% of U.S. Total
Total	100.0%	7.2%	100.0%	6.4%
Mexican	60.6	4.4	59.4	3.8
Puerto Rican	15.1	1.1	13.7	0.9
Cuban	6.1	0.4	5.5	0.4
Other Spanish *	18.1	1.3	21.3	1.4

* Includes Central or South American and other Spanish origin.

Source: Bureau of the Census, Current Population Reports:
Persons of Spanish Origin in the U.S.: March 1985
(Series P-20, No. 403 issued Dec. 1985)

Projections on the Hispanic population were compiled by the Census Bureau in 1986. According to the "middle series" of three assumptions on future Hispanic fertility, immigration and death rates, the Hispanic population may reach 19.9 million by 1990, and climb to 25.2 million by the end of this century.

The Hispanic population is aging, rising from a median of 24.1 years in 1982 to 28.0 in year 2000, 31.2 in 2020, 36.2 in 2050. Because persons of Mexican origin account for six out of 10 in the Hispanic population, there is a great concentration of Hispanics in the Los Angeles-Long Beach area where they represent over 30% of the total population, according to Sales & Marketing Management Magazine.

Asians and Pacific Islanders in the population are increasing even faster than Hispanics. The latest counts on this minority group, from the 1980 Census, totaled about 3.7 million, 142% above the 1970 total. By 1990 people classified as Chinese, Asian, Indian, Japanese, Korean, Filipino, Hawaiian, Pakistanis, etc., are expected to increase to about 5.9 million; by the year 2000, to over 8.0 million.

A Population Reference Bureau study showed that a third of Asian-Americans were living in California in 1980, and the State's share of the total is expected to be above 30% for the foreseeable future, reaching a total of 2.7 million by year 2000 (up from 1.3 million in 1980). The Chinese represent the biggest single group of Asian Americans, but they will probably be outnumbered by Filipino Americans by 1990. More than a million Filipinos and Chinese will live in the U.S. by the end of the decade.

Race/Color (continued)

Immigrants are pouring into the U.S. at a rate of about one million a year, of which an estimated 300,000 are illegals (the tide of which may be stemmed by new legislation). About two-thirds of all immigrants are settling in six states: California and Texas (which together account for about half the total) Florida, New York, New Jersey and Illinois.

Population Projections

The latest Census Bureau projections on the population were issued in May 1984. Included were three different series, each based on different assumptions as to future growth in fertility, mortality and net immigration. The "middle" of the three series has proved to be fairly close to reality thus far, and this series is drawn upon in this report.

Over the next century most growth will occur in the next 40 years. By 2030 the population based on middle projections will reach about 305 million (compared with the current level of 242 million). From 2030 to 2080, a net gain of less than six million people is anticipated.

Continuing recent trends, the population will age rapidly. As previously noted, the median age of the resident population was 31.4 years in 1985 compared with 30.0 years in 1980. By 1990, the median age is expected to reach 33 years; by 2000, 36.3; by 2020, 40.2.

It is significant that the ratio of the working-age population (age 18 to 64) to the retirement age population is declining. In 1983, there were 5.3 persons of working age for everyone age 65 and older; currently there are five; and this is expected to drop to 4.7 by year 2000, then to 2.7 by 2030; 2.4 by 2080.

The bulge in the baby-boom crop on the population chart is moving along the age scale. Population counts covering ages 18 to 24 peaked at 30.4 million in 1981. By 1994 the count will be about 24.1 million. The 30-44 year group, encompassing a major market opportunity for housing, home goods, children's needs and many other products, not only because of its size but its relative affluence, will continue to increase in numbers through this decade and beyond, as will the population 45 and over.

POPULATION TRENDS

Population Projections

POPULATION PROJECTIONS - 1987, 1994, 2005
(Middle Series*)

	Number (Thousands)			% Change	Percent Distribution		
	1987	1994	2005	2005/1987	1987	1994	2005
MALE							
Total all ages	118,309	125,464	134,297	+13.5%	100.0%	100.0%	100.0%
Under 5 years	9,656	9,635	8,931	- 7.5	8.2	7.7	6.6
5 to 9 years	8,954	9,866	9,094	+ 1.6	7.6	7.9	6.8
10 to 15 years	9,998	11,245	11,698	+17.0	8.5	9.0	8.7
16 years & over	89,701	94,718	104,574	+16.6	75.8	75.4	77.9
16 - 19	7,546	6,712	8,058	+ 6.8	6.4	5.3	6.0
20 - 34	31,767	29,725	27,416	-13.7	26.9	23.7	20.4
35 - 54	28,239	35,187	40,769	+44.4	23.9	28.0	30.4
55 - 64	10,178	9,793	14,060	+38.1	8.6	7.8	10.5
65 & over	11,971	13,300	14,271	+19.2	10.1	10.6	10.6
Median age (years)	30.8	33.0	36.0	+16.9	--	--	--
FEMALE							
Total all ages	124,774	132,251	141,381	+13.3	100.0%	100.0%	100.0%
Under 5 years	9,209	9,188	8,518	- 7.5	7.4	6.9	6.0
5 to 9 years	8,557	9,415	8,678	+ 1.4	6.9	7.1	6.1
10 to 15 years	9,554	10,745	11,167	+16.9	7.7	8.1	7.9
16 years & over	97,454	102,903	113,018	+16.0	78.1	77.9	80.0
16 - 19	7,233	6,426	7,707	+ 6.6	5.8	4.9	5.5
20 - 34	31,323	29,068	26,706	-14.7	25.1	22.0	18.9
35 - 54	29,352	36,202	41,249	+40.5	23.5	27.4	29.2
55 - 64	11,591	11,002	15,399	+32.9	9.3	8.3	10.9
65 & over	17,955	20,205	21,957	+22.3	14.4	15.3	15.5
Median age (years)	33.3	35.6	39.2	+17.7	--	--	--
TOTAL, MALE & FEMALE							
Total all ages	243,084	257,714	275,677	+13.4	100.0%	100.0%	100.0%
Under 5 years	18,866	18,823	17,449	- 7.5	7.7	7.3	6.3
5 to 9 years	17,511	19,281	17,772	+ 1.5	7.2	7.5	6.5
10 to 15 years	19,552	21,991	22,865	+16.9	8.0	8.5	8.3
16 years & over	187,155	197,619	217,591	+16.3	77.0	76.7	78.9
16 - 19	14,779	13,138	15,765	+ 6.7	6.1	5.1	5.7
20 - 34	63,091	58,792	54,122	-14.2	26.0	22.8	19.6
35 - 54	57,592	71,389	82,018	+42.4	23.7	27.7	29.7
55 - 64	21,769	20,793	29,459	+35.3	9.0	8.1	10.7
65 & over	29,926	33,507	36,227	+21.1	12.3	13.0	13.1
Median age (years)	32.0	34.3	37.6	+17.5	--	--	--

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census, Current Population Reports
Series P-25, No. 952 (May 1984)

Population Projections

U.S. Population by Single Years of Age
Infants, Children, Youths & Older
Middle Series Projections* - 1987, 1994
(Numbers in thousands)

	Total		% Change	Male		Female	
	1987	1994	1984/87	1987	1994	1987	1994
Total, all ages	243,084	257,714	+ 6.0%	118,309	125,464	124,774	132,251
Under 5 years	18,866	18,823	- 0.2	9,656	9,635	9,209	9,188
Under 1 year	3,834	3,671	- 4.3	1,963	1,880	1,871	1,792
1 year	3,810	3,721	- 2.3	1,950	1,905	1,860	1,816
2 years	3,780	3,770	- 0.3	1,935	1,930	1,845	1,840
3 years	3,743	3,814	+ 1.9	1,916	1,952	1,827	1,862
4 years	3,699	3,847	+ 4.0	1,893	1,969	1,806	1,878
5 to 9 years	17,511	19,281	+10.1	8,954	9,866	8,551	9,415
5 years	3,662	3,868	+ 5.6	1,873	1,979	1,789	1,888
6 years	3,616	3,874	+ 7.1	1,850	1,982	1,766	1,892
7 years	3,589	3,867	+ 7.7	1,834	1,979	1,755	1,888
8 years	3,387	3,849	+13.6	1,732	1,970	1,655	1,880
9 years	3,257	3,823	+17.4	1,665	1,956	1,592	1,867
10 to 14 years	16,139	18,552	+14.9	8,253	9,487	7,886	9,064
10 years	3,275	3,788	+15.7	1,675	1,938	1,600	1,850
11 years	3,172	3,746	+18.1	1,622	1,916	1,550	1,829
12 years	3,234	3,711	+14.7	1,655	1,898	1,579	1,814
13 years	3,166	3,666	+15.8	1,619	1,875	1,547	1,791
14 years	3,292	3,640	+10.6	1,682	1,860	1,610	1,780
15 to 19 years	18,192	16,577	- 8.9	9,291	8,470	8,901	8,107
15 years	3,413	3,439	+ 0.8	1,745	1,758	1,668	1,681
16 year	3,766	3,309	-12.1	1,926	1,691	1,840	1,618
17 years	3,766	3,326	-11.7	1,925	1,700	1,841	1,626
18 years	3,667	3,221	-12.2	1,870	1,645	1,797	1,596
19 years	3,580	3,282	- 8.3	1,825	1,676	1,755	1,606
20 to 24 years	19,999	17,636	-11.8	10,169	8,974	9,829	8,662
25 to 29 years	22,151	19,059	-14.0	11,153	9,631	10,998	9,429
30 to 34 years	20,941	22,097	+ 5.5	10,445	11,120	10,496	10,977
35 to 39 years	18,767	21,742	+15.8	9,297	10,841	9,470	10,901
40 to 44 years	15,652	19,491	+24.5	7,701	9,639	7,950	8,592
45 to 64 years	44,942	50,949	+13.4	21,419	24,500	23,523	26,451
65 & over	29,926	33,507	+12.0	11,971	13,300	17,955	20,206

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, No. 952 (issued May 1984)

POPULATION TRENDS

Regions, Divisions, States

From 1980 to 1986, the fastest growth in population counts on a regional basis took place in the West (up 12.9%) and in the South (up 10.1%).

Population Growth By Regions & Divisions of the U.S.
1980-1986
(Numbers in thousands)

	Estimated Resident Population		
	July 1, 1986	April 1, 1980 (Census)	% Change 1986/1980
United States	241,077	226,545	+ 6.4%
Northeast	50,018	49,137	+ 1.8
New England	12,737	12,349	+ 3.1
Middle Atlantic	37,281	36,788	+ 1.3
Midwest	59,315	58,867	+ 0.8
East North Central	41,738	41,683	+ 0.1
West North Central	17,577	17,184	+ 2.3
South	82,985	75,369	+ 10.1
South Atlantic	40,916	36,960	+ 10.7
East South Central	15,209	14,666	+ 3.7
West South Central	26,861	23,743	+ 13.1
West	48,759	43,171	+ 12.9
Mountain	13,021	11,372	+ 14.5
Pacific	35,737	31,800	+ 12.4

Source: U.S. Bureau of the Census: release on P-25 report on Population by States (Dec. 31, 1986)

California added 3.3 million people; Texas, 2.5 million; Florida, 1.9 million in the period between 1980 and 1986. Florida passed Illinois as the fifth most populous state in 1986, ranking behind California, New York, Texas and Pennsylvania.

More than half the population growth in the U.S. up until year 2000 will be centered in California, Florida, Texas, Arizona and North Carolina, according to predictions by the National Planning Association. These five states are projected to have population increases totaling to 21.8 million. Another 14% of U.S. growth will come from Georgia, Washington, Colorado, Virginia and Tennessee, according to the NPA. Most of the growth differences are attributed to the migration of people responding to job opportunities.

Three different agencies put out projections on the population of states: the Census Bureau and the Bureau of Economic Analysis of the Department of Commerce, and the National Planning Association, a private nonprofit group. There are significant differences in projections issued up to the year 2000 because of differing methods used by each source.

The most recent projections by the Census Bureau were issued in 1983. In a short time, however, the Bureau will issue a new set of projections on State population growth which is reported to incorporate new methods to obtain more reliable information, incorporating both economic and demographic factors.

How widely published projections on state populations have varied, and how carefully plans based on them should be made, will be apparent in the following examples.

POPULATION TRENDS

Regions, Divisions, States

Projections on Populations of Selected States in 2000

(Numbers in thousands)

	Census Bureau	National Planning Association	Bureau of Economic Analysis
California	30,613	32,067	31,170
Connecticut	3,062	3,577	3,772
Florida	13,316	15,071	14,628
Massachusetts	5,490	6,896	6,780
Michigan	9,208	9,789	9,358
New York	14,990	18,696	18,971
Texas	20,739	18,802	19,339

Source: Wall Street Journal, June 3, 1986

Resident Population of States, 1980, 1986

(Numbers in thousands)

	July 1, 1986	April 1, 1980 (Census)	% Change 1986/1980
U.S. Total	242,077	226,545	+ 6.4%
New England:			
Maine	1,174	1,125	+ 4.3
New Hampshire	1,027	921	+ 11.5
Vermont	541	511	+ 5.8
Massachusetts	5,832	5,737	+ 1.7
Rhode Island	975	947	+ 2.9
Connecticut	3,189	3,108	+ 2.6
Middle Atlantic:			
New York	17,772	17,558	+ 1.2
New Jersey	7,620	7,365	+ 3.5
Pennsylvania	11,889	11,865	+ 0.2
East North Central:			
Ohio	10,752	10,798	- 0.4
Indiana	5,504	5,490	+ 0.2
Illinois	11,553	11,427	+ 1.1
Michigan	9,145	9,262	- 1.3
Wisconsin	4,785	4,706	+ 1.7
West North Central:			
Minnesota	4,214	4,076	+ 3.4
Iowa	2,851	2,914	- 2.2
Missouri	5,066	4,917	+ 3.0
North Dakota	679	653	+ 4.1
South Dakota	708	691	+ 2.5
Nebraska	1,598	1,570	+ 1.8
Kansas	2,461	2,364	+ 4.1
West South Central:			
Arkansas	2,372	2,286	+ 3.8
Louisiana	4,501	4,206	+ 7.0
Oklahoma	3,305	3,025	+ 9.2
Texas	16,682	14,226	+ 17.3

(continued)

Regions, Divisions, States (continued)

Resident Population of States, 1980, 1986
(Number in thousands)
(continued)

	July 1, 1986	April 1, 1980 (Census)	% Change 1986/1980
Mountain:			
Montana	819	787	+ 4.1
Idaho	1,003	944	+ 6.2
Wyoming	507	470	+ 8.0
Colorado	3,267	2,890	+ 13.1
New Mexico	1,479	1,303	+ 13.5
Arizona	3,317	2,717	+ 22.1
Utah	1,665	1,461	+ 14.0
Nevada	963	801	+ 20.3
Pacific:			
Washington	4,463	4,132	+ 8.0
Oregon	2,698	2,633	+ 2.5
California	26,981	23,668	+ 14.0
Alaska	534	402	+ 32.8
Hawaii	1,062	965	+ 10.1

Source: U.S. Bureau of the Census: Advance release, December 31, 1986

Regional differences are noted in the age distribution of the resident population. The Northeast has the lowest percentage that are under 15 years of age -- 19.7% vs. 22.7% in the West. On the other hand, the Northeast has the highest percentage of population age 65 and over. This group represents 13.2% of the Northeast's total population; in the West, it accounts for only 10.5%, and 11.8% of the South's total, despite the migration of older people to the Sunbelt.

Resident Population of Regions By Age: July 1985

	U.S. Total	Northeast	Midwest	South	West
Number (thousands)	238,740	49,859	59,197	81,858	47,826
Percent	100.0	100.0	100.0	100.0	100.0
Age group:					
Under 5 years	7.6	6.6	7.6	7.6	8.4
5 to 14 years	14.2	13.1	14.7	14.5	14.3
15 to 24 years	16.6	16.5	16.6	16.8	16.1
25 to 34 years	17.6	16.7	17.3	17.5	19.1
35 to 44 years	13.3	13.4	12.8	13.2	14.0
45 to 54 years	9.5	10.0	9.3	9.5	9.1
55 to 64 years	9.3	10.5	9.3	9.1	8.5
65 to 74 years	7.1	7.8	7.2	7.1	6.4
75 & over	4.8	5.4	5.2	4.7	4.1

Source: U.S. Bureau of the Census, Current Population Reports: State Population & Household Estimates to 1985 (Series P-25, No. 998)

POPULATION TRENDS

Metropolitan Areas

Over 76% of the U.S. population is in metropolitan areas, and there are now 43 areas with 1 million or more persons. In 1984, the metropolitan population reached 180 million, an increase of 8 million since 1980. Nonmetropolitan America grew by about 2 million, reaching 56.4 million.

Except for the 1970's, metropolitan growth has outpaced that of the rest of the country, although the difference has narrowed in the 1980's. The largest areas -- Metropolitan Statistical Areas (MSAs) with a population of a million or more -- have grown the fastest. The latest profile of the population by metropolitan status was issued by the Census Bureau in November 1985. A preliminary report for 1985 indicates metropolitan area growth remained at about one percent compared with 1984, but nonmetropolitan area growth dropped to only 0.3%.

Population By Metropolitan Status for Regions: 1970-1984

	Population	% Change		Average Annual Change	
	1984 (thous.)	1984/80	1980/70	1980-84	1970-80
Total U.S. Population	236,158	+ 4.2	+11.4	+ 1.0	+ 1.1
Inside MSA's	179,723	+ 4.5	+10.6	+ 1.0	+ 1.0
Northeast	43,773	+ 1.1	- 1.0	+ 0.3	- 0.1
Midwest	41,643	+ 0.4	+ 2.7	+ 0.1	+ 0.3
South	55,587	+ 8.1	+21.8	+ 1.8	+ 2.0
West	38,719	+ 8.2	+22.7	+ 1.9	+ 2.0
Inside Central Cities of MSA's	74,476	+ 2.7	+ 0.8	+ 0.6	+ 0.1
Northeast	16,548	- 0.2	-10.4	- 0.1	- 1.1
Midwest	17,572	- 1.6	- 8.5	- 0.4	- 0.9
South	23,922	+ 5.3	+ 9.5	+ 1.2	+ 0.9
West	16,435	+ 6.8	+16.4	+ 1.6	+ 1.5
Outside Central Cities of MSA's	105,247	+ 5.9	+19.0	+ 1.3	+ 1.7
Northeast	27,226	+ 2.0	+ 5.8	+ 0.5	+ 0.6
Midwest	24,072	+ 1.9	+13.1	+ 0.4	+ 0.9
South	31,665	+10.3	+33.7	+ 2.3	+ 2.9
West	22,284	+ 9.3	+27.9	+ 2.1	+ 2.5
Outside MSA's	56,435	+ 3.4	+14.3	+ 0.8	+ 1.3
Northeast	5,954	+ 1.9	+ 9.9	+ 0.4	+ 0.9
Midwest	17,473	+ 0.5	+ 7.4	+ 0.1	+ 0.7
South	24,989	+ 4.3	+16.3	+ 1.0	+ 1.5
West	8,018	+ 8.3	+30.3	+ 1.9	+ 2.6

Source: U.S. Bureau of the Census: Patterns of Metropolitan Area and County Population Growth: 1980-1984 (Series P-25, No. 976)

Metropolitan Areas (continued)

Nonmetropolitan, small town markets are primarily concentrated in the Midwest and South. The Midwest has half the country's towns with a population under 2,500; the South is next, then the Northeast, and the West. The Midwest also has half the country's agriculture-dependent counties, and 46% of these counties have no incorporated town of 2,500 population. Economic conditions, particularly losses in agriculture-related jobs have led to a decline in the region's nonmetropolitan county population in recent years, dropping to -0.2% in 1985 compared with 1984.

Migration/Mobility Patterns

The South (particularly Florida and Texas) was the only region to gain more residents than it lost through U.S. migration in 1983-1984, according to a Census Bureau report issued in November 1986, and the South replaced the West as the region drawing the largest number of internal migrants -- most of the gain coming from migrants from the Midwest. In the 1983-1984 period, 3,540,000 people moved from one Region to another, and of these, 31% (1,102,000) originated in the Midwest. Of these Midwesterners, almost 57% moved to the South, while the Midwest gained only 359,000 migrants from the South. This marked the Nation's largest flow of movers. The net flow of migrants from other regions into the West, a marked trend in the mid-1970s, no longer prevailed in 1984.

Now, however, migration patterns, particularly within the South, are being affected by economic repercussions caused by the decline in oil prices and oil exloration. Between 1984 and 1985, according to a report in American Demographics (January 1987), the pattern that had prevailed for Texas was completely reversed as the State registered a net out-migration to other Southern States, and the Michigan-to-Texas migration stream fell to a trickle. California and Florida, too, are losing residents to surrounding states. Nevertheless, the three major Sunbelt States continue to grow significantly faster than the U.S. as a whole. But now they are being characterized as "revolving doors", pulling people in and sending them out to other states in the Sunbelt.

Between March 1983 and March 1984, 39.4 million people age one year and older, or 17.3% of the U.S. population, moved to a different dwelling compared with 16.6% during the 1982-1983 period. Most moves were local, i.e. within the same county (involving six out of every 10 movers); 20.8% moved within the State; 16.4% moved between States, and 2.8% moved from abroad.

Compared with the 17% of the population currently pulling up stakes annually, the Nation's mobility rate was at an all-time high of 21% between 1960 and 1961 when the suburbs were registering rapid growth. While the rate is down, the number of movers is greater now than ever, making Americans the most mobile people in the world. This has generated many new industries and services -- mini-storage facilities, truck rental, furniture rental, etc., as well as a boom in the real estate market.

Sharp differences are noted in the overall mobility rates in different regions of the country, with the highest rate noted in the West. The South, however, has the highest numerical total of movers -- 14.7 million, or 37.2% of the national total.

Migration/Mobility Patterns (continued)

Mobility Status of the Population Age One Year & Older By Regions, March 1983-March 1984

	Northeast	Midwest	South	West
All persons (thousands)	48,532	57,382	77,436	44,882
Total	100.0%	100.0%	100.0%	100.0%
Nonmovers	88.0	84.4	81.0	77.9
Movers, total	12.0	15.6	19.0	22.1
Local movement (within county)	7.3	9.9	10.9	13.3
Nonlocal:				
Between counties within state	2.4	8.2	4.2	4.4
Between states	1.8	2.2	3.4	3.6
From abroad	0.4	0.2	0.5	0.8
Percent of total movers (equal to 100%) accounted for by each region	14.8	22.8	37.2	25.2

Source: U.S. Bureau of the Census, Current Population Reports: Geographical Mobility: March 1983 to March 1984 (Series P-20, No. 407)

According to Census Bureau projections, the average person moves at least 11 times in his or her lifetime, or at a rate of one move every six years. In addition to differences in the mobility rates geographically, there are demographic differences. A survey by Gallup in 1983 indicated that employment-related reasons account for most moves: job change, 23%, job transfer, 20%; move to a larger residence, 13%; move to a better location, 11%; move from rental housing to own home, 10%; other, 23%.

Geographical mobility in the U.S. peaks among young adults in their twenties, especially in the late twenties and tends to decline thereafter. The higher rate is due to many factors peculiar to this age group: leaving school, entry into the labor force, early career mobility, establishment of a separate household, and residence in rental housing. In the 1983-1984 period, a third of the population age 20-29 years were movers including 12.6% who moved between counties -- the highest rate for any age group.

Persons with higher levels of educational attainment were more likely to move than others during the period. Among college graduates (4 years of college), 19% moved; among those with 5 years or more of college, 17% moved, compared with just 11% of persons with an educational attainment level of the eighth grade or lower.

MARITAL STATUS/MARRIAGES

The marital status of the adult population has undergone great changes over the last few decades, marked by postponement of first marriage, a growing proportion of never-married persons, and an additional growth of "singles" due to divorce and separation.

Preliminary data from the Census Bureau on the percent of men and women who had never married as of March 1986 showed an overall total of 30% of males and 22.8% of females age 15 and over. Comparable figures in 1970 were 28.1% and 22.1%, respectively. While the overall change is small, it was much sharper among younger adults.

Percent of Population Never Married in Selected Age Groups: 1970, 1980, 1986

	1986	1980	1970
Males, age 15 & over	30.0%	29.6%	28.1%
Selected age groups:			
20 to 24 years	75.5	68.8	54.7
25 to 29 years	41.4	33.1	19.1
30 to 34 years	22.2	15.9	9.4
Females, age 15 & over	22.8%	22.5%	22.1%
Selected age groups:			
20 to 24 years	57.9	50.2	35.8
25 to 29 years	28.1	20.9	10.5
30 to 34 years	14.2	9.5	6.2

Source: U.S. Bureau of the Census, Current Population Reports: Households, Families, Marital Status: March 1986 (Advance Report, Series P-20, No. 412)

Overall, there were about four unmarried men for every five unmarried women, but the ratio of unmarried men to unmarried women is much larger for young adults under age 35. In the 25-to-34 age group the ratio was 119 unmarried men for every 100 unmarried women in 1985, compared with an 84-to-100 ratio among the population age 35 to 44, and 54-to-100 for the age group 45 to 64 years.

Marketers catering to the swinging singles -- potentially those under 35 years of age -- have a target market totaling almost 46 million people, a gain of 6.8% over the 43 million counted in 1980, and about 41% over 1970's total of under 33 million. Older singles have gained in number from 24.1 million in 1980 to 28.4 million in 1985 (+17.9%); and the 1985 total was eight million more, or up 39%, compared with 1970.

Unmarried Men & Women By Age: 1970, 1980, 1985
(Numbers in thousands)

	1985		1980		1970	
	Men	Women	Men	Women	Men	Women
Total, age 15 & older	33,481	40,837	30,134	36,949	23,450	29,618
Under 25 years	16,844	15,002	17,284	15,166	15,214	13,577
25 to 34 years	7,629	6,411	5,693	4,825	2,115	1,721
35 to 44 years	3,079	3,654	1,987	2,426	1,143	1,545
45 to 64 years	3,418	6,272	2,985	5,923	2,740	5,342
65 & over	2,511	9,497	2,186	8,610	2,239	7,432

Note: Unmarried includes never married, widowed, and divorced.

Source: U.S. Bureau of the Census, Current Population Reports: Marital Status & Living Arrangements: March 1985

Delayed marriage, as well as the high cost of living and the increase in divorces, are keeping many young adults at home with their parents. A Census Bureau report shows that of all 18-to-24 year old men in 1985, 60% lived at home or in college dormitories; for women, the percentage was 48%.

In 1986, the median age at first marriage was 25.7 years for men and 23.1 years for women, according to the Census bureau. The median age at first marriage has been rising for the past 30 years, and this trend accelerated between 1975 and 1985, particularly for women.

The trend toward postponing marriage reflects a greater tendency among young adults to pursue advanced education, or to establish their careers prior to assuming family responsiblities.

Median Age at First Marriage, By Sex: 1970, 1980, 1986

Year	Men	Women
1986	25.7	23.1
1980	24.7	22.0
1975	23.5	21.1
1970	23.2	20.8

Source: U.S. Bureau of the Census, Current Population Reports, Advance Report (Series P-20, No. 412) issued November 1986

Two studies have been issued in recent months on the outlook of marriage faced by single women, each with some different conclusions. The most recent is a Census Bureau study based on data from 1978 and 1979 and on the assumption that marriage rates will not change for the next 50 years. The other analysis, released in the Summer of 1986, was a Harvard-Yale study which analyzed data from 1982 and 1985, and assumed changing rates of marriage based on changing social and economic factors. Demographers differ in their reactions to the procedures and conclusions in both studies.

MARITAL STATUS/MARRIAGES

The broad findings in the Harvard-Yale study, published by the New York Times, seem to find more support than breakouts for specific groups in the female adult population. A basic finding is that one out of every eight women born in the mid-1950's will never marry, compared with only one in 25 women in the preceding generation. Among college-educated white women born in the 1950's, nearly one in five will never marry; among young black women, almost three in ten will never marry, according to this study.

While some of the downturn is involuntary, there are other factors that are playing an increasingly important role, perhaps, in a voluntary decision not to marry, mainly as a result of women's greater economic and social independence, according to this study. The Census Bureau study was more optimistic than the Harvard-Yale report on the likelihood of marriage among never-married women in their 30's and beyond.

Marriages

Provisional estimates indicate that the national marriage rate fell between 1984 and 1985, from 10.5 to 10.2 per 1,000 population. The 1985 rate was the lowest since 1977 (9.9), and another drop is indicated for 1986. In the 10 month period January-October, 1986, the marriage rate was 10.1 compared with 10.4 in the same 1985 span. The drop in the rate follows a period of fairly steady rates from 1980-1984. The highpoint was reached in 1946 (16.4); and the low, 7.9, was in the depression year 1932.

Like the marriage rate, the number of marriages dropped in 1985, from 2,487,000 in 1984 to 2,425,000 (-2%). Despite the drop, marriages in 1985 reached the fourth greatest total in U.S. history. In the January-October 1986 period, there were a total of 2,021,000 marriages, which was 1.7% below the 2,056,000 reported by the National Center for Health Statistics in the same months of 1985.

Number of Marriages in the U.S. & Marriage Rates: Selected Years, 1970-1985

	Number	Rate
1970	2,158,802	10.6
1973	2,284,108	10.8
1975	2,152,662	10.0
1977	2,178,367	9.9
1980	2,390,252	10.6
1984	2,487,000	10.5
1985	2,425,000	10.2

Source: U.S. Dept. of Health & Human Services
National Center for Health Statistics

The percent of marriages that are first marriages for either or both bride and groom has dropped sharply, from 68.6% of marriages in 1970 to 54.4% in 1983, the latest available figure. This pattern obviously affects buying patterns relating to the bridal market.

Marriages (continued)

Percent Distribution of Marriages by Marriage Order: 1970, 1975, 1980, 1983

			Marriage Order of Bride & Groom		
Year	All Marriages	1st marriage of bride & groom	1st marriage of bride, remarriage of groom	Remarriage of bride, 1st for groom	Remarriage for both
1983	100.0%	54.4%	11.6%	10.5%	23.5%
1980	100.0	56.2	11.3	9.8	22.7
1975	100.0	60.1	9.9	8.6	21.3
1970	100.0	68.6	7.6	7.3	16.5

Source: U.S. Dept. of Health & Human Services:
Advance Report of Final Marriage Statistics, 1983
(released May 2, 1986)

There is a wide variation in the marriage rate regionally and by states. In 1985, the rate by geographic divisions ranged from a high of 18.2 in the Mountain States to a low of 8.5 in the Middle Atlantic region. Although marriage rates in New England and Middle Atlantic States were relatively low, these were the only divisions which showed a gain compared with 1980.

Among States, 1985 marriage rates ranged from lows of 7.5 in Pennsylvania and 7.6 in Nebraska and West Virgina to highs of 13.1 in Texas, 14.5 in Hawaii, 15.8 in South Carolina, and 114.2 in Nevada.

Number of Marriages & Marriage Rates, By Geographic Divisions: 1980, 1985

	1985			1980		
	Number	Percent	Rate**	Number	Percent	Rate**
U.S. Total	2,425,000*	100.0%	10.2	2,390,252	100.0%	10.6
Geographic Regions:						
New England	114,855	4.7	9.1	106,328	4.4	8.6
Middle Atlantic	315,466	12.9	8.5	293,985	12.3	8.0
East North Central	365,658	15.0	8.8	395,517	16.5	9.5
West North Central	157,251	6.4	9.0	173,720	7.3	10.1
South Atlantic	443,595	18.2	11.0	413,113	17.3	11.2
East South Central	172,440	7.1	11.4	168,828	7.1	11.5
West South Central	319,824	13.1	12.1	298,244	12.5	12.6
Mountain	233,165	9.6	18.2	241,704	10.1	21.3
Pacific	314,542	13.0	9.0	298,813	12.5	9.4

* Because some states use a different method of compiling estimates on marriages -- including for some counts on licensees issued rather than marriages -- regional totals do not add to the 1985 national total, which is separately calculated by the Health Dept.

**Rate per 1,000 population. Note that marriage counts by State, on which regional totals are based, are by place of occurrence, not necessarily the residence of the couples. In particular, this inflates the Mountain Region's rate, as many out-of-State residents, particularly Californians, marry in Nevada.

Source: U.S. Department of Health & Human Services,
National Center for Health Statistics

Marriages (continued)

Marriages are seasonal, with the fewest in January and the most in June, although monthly rates vary from year to year. In 1985, 5.3% of the marriages took place in January and 11.5% in June. Remarriages show less seasonal variation than first marriages.

Monthly Pattern in Marriages & in Marriage Rates: 1984, 1985

	Number	Percent	Rate* 1985	Rate* 1984
Total	2,425,000	100.0	42.8	44.4
January	129,000	5.3	27.0	27.2
February	146,000	6.0	33.7	37.1
March	157,000	6.5	32.7	32.4
April	174,000	7.2	37.5	37.8
May	238,000	9.8	49.6	48.5
June	280,000	11.5	60.2	66.6
July	235,000	9.7	48.7	48.3
August	255,000	10.5	52.9	55.9
September	235,000	9.7	50.3	54.2
October	206,000	8.5	42.8	42.3
November	182,000	7.5	38.9	42.0
December	187,000	7.7	38.6	41.2

* Monthly rate of marriages per 1,000 women 15-44 years of age.

Source: U.S. Department of Health & Human Services,
National Center for Health Statistics

Divorces

Of the singles counted by the Census Bureau in March 1985, 13.1 million people (7.8 million women and 5.3 million men) were divorced. Available data for the first 10 months of 1986 show the number of divorces down almost 1% compared with the same 1985 period, and the rate down to 4.9 from 5.0 per 1,000 population. The year 1985 had the third highest total recorded, reaching 1,187,000 divorces. The peak, 1,213,000, was in 1981.

HOUSEHOLDS/FAMILIES

Advance information released in November 1986 by the Census Bureau, based on the March 1986 Current Population Survey, showed a total of 88.5 million households in the U.S., a net increase of about 1.7 million over March 1985. This was higher than the net annual increase of about 1.2 million averaged in 1980-1985, but only slightly above the 1.6 million average annual increase in the 1970's.

Although most households consist of a family, many do not. A family household requires at least two persons: the householder (usually defined as the person who owns or rents the dwelling) and one or more additional persons related to the householder through birth, marriage, or adoption. Families accounted for about 72% of all households in 1986, compared with 74% in 1980 and 1981.

A nonfamily household is either a person living alone, or a householder with one or more other persons not related to the householder. Of total households, married-couple families accounted for 58%; other types of families, 14%; non-family households, 28%, as of March 1986.

In 1970, the distribution was 71%, 11%, and 18%, respectively. This contrast illustrates the growth in importance of nonfamily households which has had such an impact on consumer market patterns. Nonfamily households accounted for more than half (53%) of the total net increase in households from 1970 to 1980, and 48% of the 1980-1986 increase.

About 85% of nonfamily households in 1986 were persons living alone -- about 21.2 million people, up 16% over 18.3 million in 1980 and almost double the 1970 total of 10.8 million.

In 1986, about 2.2 million persons were maintaining living quarters which they shared with one unrelated adult of the opposite sex (including a paid employee). About 52% of unmarried couple householders in 1986 were persons who had never been married; an additional 34% were divorced. There were about four times as many unmarried couple households in 1986 as there were in 1970, but they still represent only about four out of every 100 couples in the Nation, and the rate of increase in this group has declined from 11.1% annually in the 1970's to 5.6% in the 1980's.

The average size of households in the U.S. fell to a new low in 1986 (2.67 persons). This compares with 2.76 in 1980 and 3.14 in 1970. Fewer children per family, more one-parent families and more persons living alone are all factors in this decline.

Household & Family Units, By Type: 1970-1986

	1986		1980		1970	
	Number	Percent	Number	Percent	Number	Percent
Households, total	88,458	100.0	80,776	100.0	63,401	100.0
Family households, total	63,558	71.9	59,550	73.7	51,456	81.2
Married-couple family	50,933	57.6	49,112	60.8	44,728	70.5
Other family:						
Male householder	2,414	3.8	1,733	2.1	1,228	1.9
Female householder	10,211	11.5	8,705	10.8	5,500	8.7
Nonfamily households	24,900	28.1	21,226	26.3	11,945	18.8
Living alone	21,178	23.9	18,296	22.7	10,851	17.1
Male householder	10,648	12.0	8,807	10.9	4,063	6.4
Female householder	14,252	16.1	12,419	15.4	7,882	12.4
Average population						
Per household:						
All ages	2.67		2.76		3.14	
Under 18 years	0.71		0.79		1.09	
18 years & over	1.96		1.97		2.05	
Per family:						
All ages	3.21		3.29		3.58	
Under 18 years	0.98		1.05		1.34	
18 years & over	2.23		2.23		2.25	

Source: U.S. Bureau of the Census, Current Population Reports: Households, Families, Marital Status: March 1986 (Advance Report, Series P-20, No. 412) (Issued November 1986)

HOUSEHOLDS/FAMILIES

Further details on household composition, and on families, are included in final reports released by the Census Bureau based on the March 1985 Current Population Survey. Family households with no own children under 18 years of age increased 10.7% from 1980 to 1985, bringing the number to 31.6 million (36.4% of total households). Compared with 1970, the 1985 count was up 39%.

Family households with own children under 18 years of age totaled 31.1 million. This represented a gain of 8.3% compared with the 1970 total, but was 2.5% below 1980. In 1985, households with own children under 18 years of age were only 35.8% of all U.S. households, down from 38.4% in 1980 and 45.3% in 1970. The total number of households with any children under 18 years of age amounted to 33.4 million in 1985, 38.4% of all households. These children numbered 62.6 million, or 27% of all household members.

A significant change in household composition in the past 15 years has been the growth in single person households. These numbered over 21.1 million in 1986, more than double the 1970 total. Males accounted for about 38% of the 1986 total; women, 62%. Women were generally older than the men. In 1985, 56.3% of the men living alone were under age 45. Among women, only 24.2% were under 45. The median age for women living alone was 65.5 years compared with 41.4 years for men.

A contrary development has been the increase in young adults remaining at home with parents, particularly young men. (See LIVING ARRANGEMENTS)

Household Composition: 1970, 1980, 1985
(Numbers in thousands)

	1985		1980		1970	
	Number	Percent	Number	Percent	Number	Percent
All households	86,789	100.0	80,776	100.0	63,401	100.0
Family households	62,706	72.3	59,550	73.7	51,456	81.2
No own children under 18	31,594	36.4	28,528	35.3	22,725	35.8
With own children under 18	31,112	35.8	31,922	38.4	28,731	45.3
Married couple family	50,350	58.0	49,112	60.8	44,728	70.5
No own children under 18	26,140	30.1	24,151	29.9	19,196	30.3
With own children under 18	24,210	27.9	24,961	30.9	25,532	40.3
Other family, male householder	2,228	2.6	1,733	2.1	1,228	1.9
No own children under 18	1,331	1.5	1,117	1.4	887	1.4
With own children under 18	896	1.0	616	0.8	341	0.5
Other family, female householder	10,129	11.7	8,705	10.8	5,500	8.7
No own children under 18	4,123	4.8	3,261	4.0	2,642	4.2
With own children under 18	6,006	6.9	5,445	6.7	2,858	4.5
Nonfamily households	24,082	27.7	21,226	26.3	11,945	18.8
Male householder	10,114	11.7	8,807	10.9	4,063	6.4
Living alone	7,922	9.1	6,966	8.6	3,532	5.6
Female householder	13,968	16.1	12,419	15.4	7,882	12.4
Living alone	12,680	14.6	11,330	14.0	[illegible],319	11.5

Source: U.S. Bureau of the Census, Current Population Reports, Household & Family Characteristics: March 1985 (Series P-20, No. 411)

Selected Characteristics of U.S. Households: March 1985
(Numbers in thousands)

	Number	Percent
All households	86,789	100.0%
Households with members:		
Under 18 years of age	33,358	38.4
18 to 64 years of age	73,147	84.3
65 years & over	20,128	23.2
Number of household members:		
All ages	233,516	--
Under 18 years of age	62,609	--
18 to 64 years of age	144,204	--
65 years & over	26,703	--
Race of household head:		
White, total	75,328	86.8
With members under 18	27,712	31.9
With members 65 & older	18,048	20.8
Black, total	9,480	10.9
With members under 18	4,584	5.3
With members 65 & older	1,802	2.1
Spanish origin, total (includes Blacks, Whites)	4,883	5.6
With members under 18	2,827	3.3
With members 65 & older	632	0.7
All households	86,789	100.0%
Age of householder:		
Under 25 years	5,438	6.3
25 to 29 years	9,637	11.1
30 to 34 years	10,377	12.0
35 to 44 years	17,481	20.1
45 to 54 years	12,628	14.5
55 to 64 years	13,073	15.1
65 to 74 years	10,851	12.5
75 years & over	7,305	8.4
Household size:		
1 person	20,602	23.7
2 persons	27,389	31.6
3 persons	15,465	17.8
4 persons	13,631	15.7
5 or more persons	9,703	11.2
Marital status of householder:		
Married, spouse present	50,350	58.0
Married, spouse absent	3,913	4.5
Widowed	11,348	13.1
Divorced	9,800	11.3
Single (never married)	11,377	13.1

Source: U.S. Bureau of the Census, Current Population Reports: Household & Family Characteristics: March 1985 (Series P-20, No. 411)

HOUSEHOLDS/FAMILIES

As previously noted, family households numbered 62.7 million in 1985 (72.3% of total households). The Census Bureau has developed specific information on characteristics of families, including the number with young children, and the labor force status of the 50.3 million married couple families, among other measurements.

Selected Characteristics of Family Households: March 1985
(Numbers in thousands)

	Number	Percent
All families	62,706	100.0%
With own children under 18	31,112	49.6
6 to 17 only	16,911	27.0
Some 6 to 17, some under 6	6,204	9.9
Under 6 only	7,997	12.7
Married-couple families	50,350	100.0
In labor force:		
Husband only	14,737	29.3
Husband & wife	25,014	49.6
Wife only	2,343	4.7
Neither husband or wife	8,256	16.4

Source: U.S. Bureau of the Census, Current Population Reports: Household & Family Characteristics: March 1985 (Series P-20, No. 411)

Geographic Distribution

Since the average number of persons per household in most States is similar to the national average, the distribution of households among the States is quite similar to the distribution of population. From 1980 to 1985, the estimated national increase in households was 8.8%, compared with 5.4% in resident population. The more rapid gain in households is due to changes in age structure as well as in living arrangements. From 1980 to 1985, the population 18 years of age and over, which includes virtually all householders (formerly called "household head"), increased by 7.9%, while the population under 18 declined by 1.2% and dropped from 28.1% to 26.4% of the total population.

Estimated Number of Households By Region & Geographic Division: 1980, 1985
(Numbers in thousands)

	1985	1980	% Change 1985/1980
United States, total	87,489	80,390	+ 8.8%
Northeast	18,424	17,471	+ 5.5
New England	4,671	4,362	+ 7.1
Middle Atlantic	13,753	13,109	+ 4.9
Midwest	21,689	20,859	+ 4.0
East North Central	15,189	14,654	+ 3.7
West North Central	6,500	6,205	+ 4.7

(continued)

HOUSEHOLDS/FAMILIES

Geographic Distribution

Estimated Number of Households By Region & Geographic Division: 1980, 1985
(Numbers in thousands)
(continued)

	1985	1980	% Change 1985/1980
South	29,891	26,486	+12.9
South Atlantic	14,979	13,160	+13.8
East South Central	5,448	5,051	+ 7.9
West South Central	9,464	8,276	+14.4
West	17,485	15,574	+12.3
Mountain	4,595	3,986	+15.3
Pacific	12,890	11,587	+11.2

Source: U.S. Bureau of the Census, Current Population Reports: State Population & Household Estimates to 1985 (Series P-25, No. 998)

California ranks as the leading State in terms of number of households, followed by New York, then Texas. California also leads in terms of numerical increase in households in the past five years, but Alaska was the leader in terms of percentage growth.

States Ranked by Largest Number of Households & Increase in Households: 1980-1985
(Numbers in thousands)

Rank		No. of Households 1985		Numerical Increase 1980-85		Percent Increase 1980-85
1	Calif.	9,675	Calif.	1,045	Alaska	31.2
2	New York	6,661	Texas	875	Nevada	23.3
3	Texas	5,804	Florida	768	Arizona	20.9
4	Florida	4,512	New York	320	Florida	20.5
5	Penn.	4,368	Georgia	283	Texas	17.8
6	Illinois	4,198	N. Carolina	263	Georgia	15.1
7	Ohio	3,970	Virginia	204	Colorado	14.8
8	Michigan	3,271	Arizona	200	New Mexico	14.3
9	New Jersey	2,724	New Jersey	175	New Hampshire	13.2
10	N. Carolina	2,306	Colorado	157	N. Carolina	12.9

Source: U.S. Bureau of the Census, Current Population Reports: State Population & Household Estimates to 1985 (Series P-25, No. 998)

HOUSEHOLDS/FAMILIES

Projections

In 1986, the Census Bureau published projections of the number of households and families for the years 1986 to 2000. Three different series were issued, each based on different assumptions regarding future rates of household formation and population change.

According to the highest series, the number of households in the U.S. would reach 110.2 million by July 1, 2000 -- 23.4 million more than the 86.8 million in March 1985. The lowest series anticipates a total of 102.4 million by the year 2000, or an increase of 15.7 million households. These two series show increases of 27% and 18%, respectively, over the 1985-2000 period.

Husband-wife households made up 58% of all households in 1985. In the projections for the year 2000, husband-wife households range from 47% of all households in the highest total projection (Series A) to 59% of the lowest projected total (Series C). (For further details, see: Bureau of the Census, Current Population Reports: Population Estimates & Projections: Projections of the Number of Households & Families 1986-2000 (Series P-25, No. 986).

The most important developing trend is the middle-aging of American households. According to the middle series of projections, householders aged 35 to 54 will account for the bulk of household growth in the next 15 years. Between 1985 and 1990, the nation will gain more households headed by persons age 35 to 44 than age 45 to 54, but after 1990, growth will be dominated by the older group. The number of householders 45 to 54 years of age is expected to increase by an average of 700,000 a year through the 1990's.

Beginning in the 1990's, households headed by 25-34-year olds will decline; and newlyweds will represent a dwindling share of all new households.

LIVING ARRANGEMENTS

Young Adults

Among young adults age 18 to 24 years in 1985, 60% of the men and 48% of the women lived at home with their parents (including unmarried college students living in dormitories), compared with 52% of young men and 35% of young women in 1969. The increase in young adults with this type of living arrangement has accelerated in the past five years while the proportion living in households of their own has declined.

The decline in the proportion of young men maintaining a family began in the 1970's with a drop from 30% in 1970 to 16% in 1985. The decline for young women has been occurring since 1960 when more than one-half of those age 18 to 24 were maintaining families as either household head (householder) or spouse, compared with 32% in 1985.

The proportion of "older" young adults (25 to 34 years) who live with their parents now seems to be on the rise. For men it went from 10.5% to 13.3% between 1980 and 1985; and for women stood at 8.0%, up from 6.6% in 1970.

LIVING ARRANGEMENTS

The Elderly

At age 65 to 74 years, 62% of the noninstitutional population are married and living with their spouse. About one-fourth are alone, and 11% live with relatives. A larger percentage (38%) of the population age 75 and older live alone, or with relatives (19%).

The living arrangements of men vary only slightly across the two age groups while significant differences exist for women. Because of the greater longevity of women, fewer are living with their spouse as they age. Only half of the women age 65 to 74 years lived with their husbands in 1985, and by age 75 or older the proportion declined to slightly less than one-fourth. Among women age 65 to 74 years, 35% lived alone, and this rose to 50% for women age 75 years and older. The proportion living with another relative increased from 14% to 25%.

Persons Living Alone

The aging of the baby boomers, the relative prosperity of young adults, delayed marriages, and divorce, have led to a sharp increase in the number of persons living alone. In 1985, a total of 7.9 million men lived alone -- 13.7% above the 1980 total, and more than double the number in 1970. Of the 1985 total, men age 25 to 44 accounted for 46.9%, up from 41.9% of men living alone in 1980, 26.4% in 1970.

Women living alone totaled 12.7 million in 1985, 11.9% higher than the 1980 total. In contrast with the age distribution of young men living alone, women age 25 to 44 years accounted for less than 20% of the 1985 female total, up from 16% in 1980, 9.2% in 1970. Most women living alone were age 45 and older according to the Census Bureau.

Children

Out of 62.5 million children under 18 years of age in 1984, 14.6 million (23%) lived with only one parent, compared with 9% in 1960, 12% in 1970 and 20% in 1980. Nine out of 10 children in a single-parent situation lived with the mother. Among black children, 54% versus 18% for white children and 29% for children of Spanish origin. A total of 46.1 million children under 18 lived with both parents (74% versus 85% in 1970); 1.6 million lived with someone other than a parent.

FERTILITY/BIRTHS

Two different series of government statistics cover the subject of fertility and births in the U.S. The Bureau of the Census provides data on fertility rates among women age 18 to 44, which counts the number of women who gave birth (counting multiple births and more than one birth per woman in a 12-month period as one) in relation to the total female population age 18 to 44 years.

The National Center for Health Statistics, U.S. Department of Health and Human Services, on the other hand, reports statistics on the number of children born to U.S. residents in the 15-to-44 age group.

FERTILITY/BIRTHS

The salient feature of American fertility since the mid-1970's, pointed out by the Census Bureau, is its relatively low and stable level. This is in comparison with the high levels of fertility in the baby boom years (1946-1964) which peaked in the late 1950's, and the subsequent rapid decline in fertility which continued through the early 1970's.

At the peak in 1957, the fertility rate among women 18 to 44 years measured 123 births per 1,000 women. The rate has remained between 65 and 70 births per 1,000 since 1973, and a continuation of the current low levels of fertility is expected for the near future.

Childbirth Status of U.S. Women Age 18 to 44 Years
Selected Years Ending in June -- 1976-1985
(Numbers in thousands)

	1985	1984	1982	1980	1976
Female population					
18-44 years of age, total	50,951	50,304	48,666	46,652	41,618
By age groups:					
18 - 24	14,042	14,408	14,801	14,456	13,845
25 - 29	10,746	10,644	10,286	9,419	8,864
30 - 34	10,078	9,745	9,405	8,651	7,160
35 - 39	8,859	8,575	7,838	7,144	6,064
40 - 44	7,226	6,932	6,336	5,983	5,685
Fertility rate in 12-month period ending June per 1,000 women:					
Age 18-44 years	68.6	65.8	70.5	71.1	67.2
18 - 24	95.4	86.9	88.3	96.6	93.2
25 - 29	109.2	105.5	110.7	114.8	104.8
30 - 34	69.9	72.2	73.5	60.0	56.4
35 - 39	25.9	22.7	29.4	26.9	22.6
40 - 44	7.1	5.5	10.5	9.9	6.5
Percent of female population age 18-44 years who gave birth in 12-month period ending June:					
Total, 18-44 years	6.9%	6.6%	7.0%	7.1%	6.7%
18 - 29	10.1	9.5	9.7	10.4	9.8
30 - 44	3.8	3.7	4.2	3.5	3.0
Percent of female population age 18-44 who were childless as of June:					
Total, age 18-44 years	38.1%	37.6%	38.2%	36.7%	35.1%
18 - 24	71.4	71.4	72.2	70.0	69.0
25 - 29	41.5	39.9	38.8	36.8	30.8
30 - 34	26.2	23.5	22.5	19.8	15.6
35 - 39	16.7	15.4	14.4	12.1	10.5
40 - 44	11.4	11.1	11.0	10.1	10.2

Source: U.S. Bureau of the Census: Current Population Reports, Fertility of American Women: June 1985 (Series P-20, No. 406)

POPULATION TRENDS

Fertility/Births

The Census Bureau cautions that because of sampling variability in the Current Population Survey, the fertility rate for the 12-month period ending June 1985 (68.6 per 1,000) cannot be judged to be statistically different from the 1984 rate (65.8 per 1,000), which had previously been estimated as the lowest level recorded so far in the 1980's. However, an increase is indicated.

Increases have been noted in recent years in birth rates amoung older women. However, those aged 18 to 29 have accounted for 72% of births among women 18 to 44 years of ages since 1982 (compared with over 79% in 1976, 76% in 1980).

Fertility rates in 1985 for all Hispanic women 18 to 44 years old (107.3 per 1,000), and in each age bracket, were significantly higher than for women not of Spanish origin. An estimated 410,000 Hispanic women had a birth in the 12-month period prior to June 1985, representing 11.7% of all births reported, even though Hispanic women 18 to 44 constituted only 7.5 of the total female population in this age group.

The rates for black women 18 to 44 years were higher than noted among white women (76.4 and 66.9 per 1,000, respectively), but they did not have consistently higher rates in all age groups. Among women age 18 to 24, the rate for black women was 129.1 vs. 89.8 among white women. The pattern was reversed among women age 25 to 29 years: for white women; 113.1 per 1,000; for black women: 85.0 per 1,000. Among women 30 and over, no significant difference in fertility was found between the two races.

Overall, 39% of the 18-to-44-year old women who had a birth in the period ending June 1985 reported it was their first birth -- about the same percentage reported in 1980. A notable development has been the growth in the percentage of recent mothers who are in the labor force -- 48 percent in June 1985 compared with 38% in 1980 and 31% in 1976. Large increases were noted both for women age 18 to 29 and those age 30 to 44 years.

Among women in the labor force who gave birth in 12-month reporting periods, a higher percentage in all age groups reported first births rather than second or higher order births, as might be expected. Overall, of women reporting a first birth in the year ending June 1985, 53% were in the labor force.

The great increase in the number of working mothers and the fact that so many babies are first-borns requiring new wardrobes, equipment and supplies rather than hand-me-downs, as well as more emphasis on gifts from relatives and friends, has had a big impact on baby business. Even as total births wane, these factors will remain a strong factor in the market.

On the other hand, the growing number of childless couples, which have distinct spending patterns, as well as about one-fifth more money to spend than couples with children, has been a major factor in the growth in sales of high-quality goods, luxury items, recreation and entertainment. According to a report in American Demographics, the number of young, childless couples increased 75% between 1968 and 1985, while the number of young couples with children increased by only 8%.

In the future, the decision of young couples to postpone having children may be affected more by economic necessity than the desire for the good life. The high level of debt caused by record borrowing to meet college expenses, now noted amoung young people is a cause for concern. A recent Congressional report indicated that a third to a half of undergraduates are heavily in debt as they leave school and enter their lowest earning years.

Women Who Gave Birth in Selected Years Ending June -- 1976-1985

	1985	1984	1982	1980	1976
Total number of women who gave birth in 12 months ending June (thousands)*	3,497	3,311	3,433	3,247	2,797
Age distribution:					
Total, 18-44 years	100.0%	100.0%	100.0%	100.0%	100.0%
18-24	38.3	37.8	38.1	43.0	46.2
25-29	33.5	33.9	33.2	33.3	33.2
30-34	20.1	21.2	20.1	16.0	14.4
35-39	6.6	5.9	6.7	5.9	4.9
40-44	1.5	1.2	1.9	1.8	1.3
Percent of total who are in the labor force:					
Total, 18-44 years	48.4	46.7	43.9	38.0	31.0
18-29	47.9	44.5	42.5	38.2	31.8
30-44	49.6	52.2	47.5	37.3	27.6

* The number of children born in each 12-month period is of course larger due to multiple births and to the fact that some women may have given birth more than once in a 12 month period (but are counted only once in the above table).

Source: U.S. Bureau of the Census: Current Population Reports, Fertility of American Women: June 1985 (Series P-20, No. 406)

Based on current trends in greater educational attainment among women workers, increasing age at first marriage and first birth, and their upward mobility based on occupation, a continuance in the trend among women to return to work quite quickly after childbirth is expected. This will have an impact on future birth totals and indicates a continuation in the trend to the one-child household.

Birth Totals

The annual total of births in the U.S. took an upward turn following a 15-year decline between 1960-1975, leveling off at about 3.7 million in recent years. However, this is far below the 4,332,000 babies born in 1957, the peak year of the boom. The increase in births in the 1980's is a reflection of larger numbers of women of childbearing age rather than an increase in fertility rates (births per 1,000 women age 15 to 44). After this year, a downturn is expected in birth totals. The general fertility rate in 1985 was 66.1, which was 25% below the 1970 rate of 87.9, 46% below the 1957 rate of 122.7.

Birth Totals (continued)

Trends in Births & Fertility Rates: 1970-1985
(Adjusted for Underregistration of Births)

Calendar Year	Births* (thousands)	General Fertility Rate (Births per 1,000 Women Age 15-44)**
1985	3,750	66.1
1984	3,690	66.0
1983	3,639	65.8
1982	3,681	67.3
1981	3,629	67.4
1980	3,612	68.4
1979	3,494	67.2
1978	3,333	65.5
1975	3,144	66.0
1970	3,739	87.9

* Includes births among U.S. Armed Forces overseas.
**Fertility rates are based on births among the resident U.S. population.

Source: U.S. Bureau of the Census: Current Population Reports,
Estimates of the U.S. Population & Components of Change
(Series P-25, No. 990)

In the 12 months ending October 1986, there were a total of 3,718,000 live births in the U.S., down about 1% from the total reported for the same 1985 period, according to provisional data from the National Center for Health Statistics. This source reported the fertility rate at 64.8 and the birth rate per 1,000 population at 15.5 in the 1986 period. Each of these rates were 2% below rates in the comparable period ending October 1985 (66.3 and 15.8, respectively).

What demographers refer to as the "birth dearth" actually began in 1972, when the total fertility rate, which measures the number of children the average women bears, fell below the 2.1 rate necessary to retain a stable population (although the population has continued to grow due to the baby boom crop of women of child-bearing age).

But the number of young women age 16 to 29 years is diminishing, and will continue to do so until 1997 because of the low birth totals in the 1970's. At the same time, it is expected that birth rates among women under 30, who typically account for over 70% of U.S. births, will remain low. The combination of modern contraceptive techniques and postponement or foregoing childbirth by women who wish to take advantage of the benefits from working are all important factors for a continued low level in the fertility rate in coming years.

FERTILITY/BIRTHS

Birth Order

As the number of births turns downward, the good news for marketers lies in the fact that a high percentage of new-borns are first babies -- currently about 42% -- requiring a greater outlay for the nursery and its occupant than needed for subsequent arrivals. It has been estimated that parents spend only 69% as much on a second child as they do on a first child. In addition, there has been a marked increase in the percent of first-borns who have mothers age 30 years or older (up from 4% in 1971 to 13% currently), and these mothers are more affluent than younger mothers. The pattern in making-up for delayed childbearing appears to have intensified as the first-birth rate shows a rapid increase among women age 35 to 39 years -- even more than for women age 30 to 35 years.

Live-Birth Order -- Percent of Total Births in Selected Years, 1972-1984

	1984	1983	1979	1972
Total live births	100.0%	100.0%	100.0%	100.0%
Birth order:				
First	41.7	42.1	42.3	39.6
Second	33.0	32.6	32.0	28.5
Third	15.3	15.2	15.1	14.1
Fourth & higher	9.5	9.6	10.7	15.0
Not stated	0.5	0.5	--	2.8

Source: U.S. Dept. of Health & Human Services, National Center for Health Statistics: Advance Report of Final Natality Statistics, 1984 (July 18, 1986)

Sex Ratio In Births

The sex ratio at birth in 1984 was 1,050 males per 1,000 females, slightly below the ratio of 1,052 observed in 1983. Since 1967, there has been little annual variation in the sex ratio, with a range of 1,050 to 1,055 in this period.

Since the mid-1960's, the ratio for whites has ranged from 1,053 to 1,059; among blacks, it has ranged from 1,024 to 1,033 males per 1,000 females since 1970.

Monthly Pattern in Births

The pattern in births in the U.S. is very consistent over the years. The peak months are July, August and September. Fertility rates are higher in the last six months of the year than in the first six months.

Percent Distribution of Registered Live Births By Months, 1982-1984

	1984(r)	1983	1982
Birth total	100.0%	100.0%	100.0%
January	8.0	8.2	8.1
February	7.7	7.6	7.5
March	8.3	8.5	8.3
April	7.8	8.1	7.9
May	8.2	8.3	8.3
June	8.1	8.4	8.4
July	8.9	8.7	8.9
August	9.1	8.9	8.9
September	8.9	8.6	8.9
October	8.7	8.4	8.5
November	8.1	8.0	8.0
December	8.2	8.2	8.2

(r) revised

Source: U.S. Department of Health & Human Services,
National Center for Health Statistics

Ages of Fathers of New-Borns

In 1984 the birth rate for men declined for the second consecutive year, to 55.0 births per 1,000 men aged 15-54 years compared with 55.3 in 1983. The rate for white men dropped from 51.5 in 1983 to 51.2 in 1984; for black men, from 78.0 to 77.6. Consistent with the pattern noted previously on delayed parenting, increases in birth rates have been reported for older men 40 to 54 years of age, particularly those aged 35-44 years.

Educational Attainment of Parents of New-Borns

In 1984, 79% of mothers and 85% of fathers of new-born children had graduated from high school (with the latter figure possibly overstated as it is based primarily on married fathers). In 1984 and in 1983, 16% of the mothers had graduated from college.

Mothers aged 30-34 had the highest level of educational attainment. The median number of years of schooling for mothers in their early thirties was 14.2; for those aged 35-39 years, the median was 14.0 years, higher in both cases than in 1983.

A disparity exists between black mothers and white mothers on educational attainment. In 1984, 82% of white mothers vs. 67% of black mothers had completed high school. Among white mothers, 18% had completed college compared with 7% of the black mothers.

FERTILITY/BIRTHS

Regional Variations in Birth Totals

Marketers of baby products, services, and maternity wear, as well as young children's products, should focus on the South and Midwest, which accounted for 34.3% and 25.5%, respectively, of total births reported in the five year period 1980-1984. Within the Midwest Region, the East North Central States (Ohio, Indiana, Illinois, Michigan and Wisconsin) accounted for the largest segment (17.7%) of total births reported for any geographic division, followed by the Pacific division (Washington, Oregon, California, Alaska, and Hawaii), with 15.6%.

Number of Births By Region & Division, 1980-1984
(In thousands)

	Number	Percent
Total births, 1980-1984	15,461	100.0%
Northeast	2,837	18.3
New England	704	4.5
Middle Atlantic	2,133	13.8
Midwest	3,929	25.4
East North Central	2,732	17.7
West North Central	1,197	7.7
South	5,308	34.3
South Atlantic	2,364	15.3
East South Central	977	6.3
West South Central	1,967	12.7
West	3,388	21.9
Mountain	982	6.3
Pacific	2,406	15.6

Source: U.S. Bureau of the Census: State Population Estimates, By Age & Components of Change: 1980-1984 (Series P-25, No. 970)

Data from the National Center of Health Statistics shows a wide variation in fertility rates per 1,000 women age 15-44 by state and region. In 1984, the highest rate was 101.9 (Utah); the lowest, 55.2 (Massachusetts)

Live Births By Race of Child, Birth Rates & Fertility Rates, 1984
U.S. & Nine Geographic Regions

	Number (thousands)			Birth	Fertility
	Total*	White	Black	Rate**	Rate**
U.S. total	3,669.1	2,923.5	592.7	15.5	64.4
New England	172.2	156.4	12.2	13.7	56.7
Middle Atlantic	509.5	402.2	94.4	13.7	58.5
East North Central	627.1	518.9	97.8	15.1	63.9
West North Central	274.2	246.0	19.2	15.7	68.5
South Atlantic	575.8	402.2	163.5	14.6	61.5
East South Central	221.4	159.1	60.5	14.7	62.6
West South Central	469.8	370.9	84.9	17.9	75.2
Mountain	231.8	206.3	7.9	18.4	77.0
Pacific	587.4	461.4	52.5	17.1	70.5

* Includes races other than White and Black.
**Birth rates per 1,000 estimated total population in each area; fertility rates per 1,000 women aged 15-44 years in each area.

Source: National Center For Health Statistics: Advance Report of Final Natality Statistics, 1984

SCHOOL ENROLLMENT

Preprimary School

An important development for marketers of children's wear has been the great growth in nursery school and kindergarten enrollment. Two factors have contributed: first, the increase in birth totals in most years since 1978 -- reversing the birth-dearth years in the 1960's and early 1970's; second, the great expansion in the number of mothers of young children who are in the labor force and who look to schools to provide child-care. The level of births in recent years, as well as women's labor-force participation rates, indicate that preprimary school enrollment will continue to grow for the next few years, then start to decline as birth totals dip.

In 1985, 2.5 million children were enrolled in nursery school, 25% more than the 2.0 million enrolled in 1980. Of the total population age 3 and 4, 39% were enrolled, up from 31% in 1975 and 11% in 1965. Girls outnumber boys in nursery school (but not in the total population ages 3 and 4).

Population gains among 5-year olds have led to a significant increase in kindergarten enrollment in the last two years. The latest count, for 1985, showed a total of 3.8 million kindergarten students, a gain of 9.5% compared with 1984. The enrollment rate for this age was 94% in 1985 compared with 80% in 1970. (Rates in the past increased, but the number of 5-year-olds in the population was decreasing from the late 1960's through 1970's. Now both trends are in the same direction).

Enrollment in Nursery School & Kindergarten: 1980, 1985
(Numbers in thousands)

	1985	1980	% Change 1985/1980
Number Enrolled			
Preprimary school, total	6,306	5,163	+ 22.1%
Nursery school, total	2,491	1,987	+ 25.4
Public	854	633	+ 34.9
Private	1,637	1,354	+ 20.9
Kindergarten, total	3,815	3,176	+ 20.1
Public	3,221	2,690	+ 19.7
Private	594	486	+ 22.2
Percentage of Children Enrolled in School			1970
Age 3 and 4 years	38.9%	36.7%	20.5%
Age 5 and 6 years	96.1	95.7	89.5

Source: U.S. Bureau of the Census, Current Population Reports: Population Characteristics (Series P-20, No. 409) Sept. 1986

Elementary School & High School

Enrollment in elementary school peaked in 1970, at 33,950,000; then went into a steady decline until 1984, leveling off in 1985, following the trends in population counts among school-age children. In 1985, 26,866,000 pupils were in the Nation's elementary schools, just 28,000 more than in 1984. Enrollment will continue to pick up as a result of the increase in birth totals in recent years.

Elementary School & High School (continued)

It will be some years, however, before significant increases are noted in the number of high school students. The total in 1985 was 13,979,000, which was 11% below the 1977 peak when 15,753 students were counted.

Enrollment in Elementary School & High School: 1980, 1985
(Numbers in thousands)

	1985	1980	% Change 1985/1980
Elementary school, total	26,866	27,449	- 2.1%
Public	23,803	24,398	- 2.4
Private	3,063	3,051	+ 0.4
High school, total	13,979	14,556	- 4.0
Public	12,764	13,249*	- 3.7
Private	1,215	1,100*	+ 10.4

* Year 1981 (1980 not available)

Source: U.S. Bureau of the Census, Current Population Reports: Population Characteristics (Series P-20, No. 409) Sept. 1986

College

The period 1965-1975 was marked by a great growth in the number of college students as a result of the "baby boom" years. Growth after 1975 has been mainly among older students, age 25 to 34 years, and older. Women have become a larger proportion of college students, as have Blacks. Part-time students account for a bigger share of college enrollment than 10 years ago (about 29% in 1985 vs. 27% in 1975). A recent Federal government study shows that fewer than half of all students get their college degrees four years after graduating from high school.

Paving their way into better paying occupations, in 1985, women earned 30% of all medical degrees, up from 13% in 1975; 21% in dentistry (up from 3%); 38% in law (up from 15%). Of women entering college in the fall of 1985, 28% chose business as their major -- the most popular field for both men and women.

Enrollment in College: 1980, 1985
(Numbers in thousands)

	1985	1980	% Change 1985/1980
College, total	10,863	10,180	+ 6.7%
Full time	7,720	7,147	+ 8.0
% of total	71.1%	73.3%	--
Public	7,131	6,754*	+ 5.6
Private	2,203	2,229	- 1.2

* Year 1981 (1980 not available)

Source: U.S. Bureau of the Census, Current Population Reports: Population Characteristics (Series P-20 No. 409) Sept. 1946

SCHOOL ENROLLMENT

College (continued)

The level of college student enrollment in high tech courses needed to provide the skilled force required if the U.S. is to maintain its competitive position is currently of concern to economists, as it is reported that half the students enrolled in U.S. technical colleges (graduate courses) are foreign students. A "brain drain" is seen in the influx of young Americans into careers in finance and law, rather than technology.

Total, All Students

Estimated Number of Persons 3 to 34 Years Old Enrolled in School, By Age & Sex: 1985

Age	Male		Female	
	Number (thous.)	Percent*	Number (thous.)	Percent*
3 & 4 years	1,298	36.7	1,395	41.2
5 & 6 years	3,221	95.3	3,129	97.0
7 to 13 years	12,088	99.2	11,537	99.3
14 to 17 years	7,169	95.4	6,801	94.5
18 & 19 years	2,075	52.2	2,061	51.0
20 & 21 years	1,467	36.5	1,443	34.1
22 to 24 years	1,157	18.8	970	15.1
25 to 34 years	1,471	14.8	1,618	15.9

* Percent of total civilian population in each age group.

Source: Based on the Census Bureau reports

EDUCATIONAL ATTAINMENT

The latest available Census Bureau reports show that, as of March 1984, 73% of the U.S. population had completed at least four years of high school compared with 55% in 1970. Among those age 25 or older, 35% had one or more years of college, 19% were college graduates.

Figures for March 1985 show that of all heads (householders) in family households, 20% (12.8 million) had four or more years of college; 16.1% (10.1 million) had one to three years of college; about 37% were high school graduates (23.2 million); 13.1% (8.2 million) had had one to three years of high school.

LABOR FORCE, EMPLOYMENT, EARNINGS

Labor Force

Great changes have occurred in the size and composition of the nation's labor force since 1970 -- reflecting the changing age distribution of the population and the influx of women into the labor market. The labor force expanded at an extraordinary 2.6% annual rate in the 1970's, according to the Bureau of Labor Statistics, but the rate of growth slowed to an average 1.5% from 1980 to 1984. Looking beyond that year, the BLS has compiled a series of three projections on the outlook through 1995, based on different assumptions regarding the economy and population growth. The middle range of the three projections anticipates a continued decline in the rate of growth of the labor force, with an annual average of 1.3% from 1984 to 1990, and 1.0% from 1990 to 1995, due to lower birth totals.

LABOR FORCE, EMPLOYMENT, EARNINGS

Labor Force

There is variation in the expected rate of change for different age groups. The number of workers under age 25 actually fell by 1.7 million from 1980 to 1985, and they will register another 3.5 million decrease by 1995. A shortage of younger workers will cause problems for some employers in coming years, even though this group's unemployment rates have been much above the norm. Another development affecting labor force size, especially in the Southwest, will result from the passage in October 1986 of a new immigration law banning (except for farm workers under specified conditions) the hiring of illegal immigrants, variously estimated to now total from three million to six million people. Both of these developments can be expected to have an impact on labor costs.

Average Annual Rate of Change in the Size of the Civilian Labor Force

	1970-75	1975-80	1980-84	1984-90*	1990-95*
Total, 16 years & over	2.5	2.7	1.5	1.3	1.0
Men	1.9	1.8	1.0	0.8	0.6
16 to 24	4.9	1.9	-1.7	-2.2	-1.1
25 to 54	1.7	2.0	2.2	2.2	1.3
55 & over	-0.8	0.4	-0.9	-1.8	-0.9
Women	3.5	4.0	2.2	1.9	1.5
16 to 24	4.8	2.7	-0.9	-1.8	-0.9
25 to 54	3.7	5.9	3.8	3.4	2.4
55 & over	0.6	1.9	0.8	-0.8	-0.1
White	2.4	2.5	1.3	1.1	0.9
Black	na	3.2	2.6	2.1	1.7

na not available
* Middle of a series of three projections by the BLS.

Source: U.S. Bureau of Labor Statistics:
Monthly Labor Review, November 1985

The latest annual summary on the composition of the labor force is for the year 1985. How this compares with 1975, and BLS projections for the year 1995, for men and for women, is summarized below. The projection for 1995 is the middle of three projections made by the BLS.

Civilian Labor Force By Sex & Age, 1975, 1985 & Middle Growth Projection for 1995

	Labor Force (thousands)			% Inc.	% of Population in the Labor Force		
	1975	1985	1995	1985/75	1975	1985	1995
Total, 16 years & over	93,775	115,461	129,168	+23.1	61.2	64.8	66.6
Men, total	56,299	64,411	69,282	+14.4	77.9	76.3	75.3
16 to 19	4,805	4,134	3,750	-14.0	59.1	56.8	57.9
20 to 24	7,565	8,283	6,790	+ 9.5	84.5	85.0	87.3
25 to 34	14,192	18,808	18,247	+32.5	95.3	94.7	93.7
35 to 44	10,398	14,506	19,232	+39.5	95.6	95.0	94.3
45 to 54	10,401	9,870	13,721	- 5.1	92.1	91.0	90.4
55 to 64	7,023	7,060	6,119	+ 0.5	75.6	67.9	62.6
65 & over	1,914	1,750	1,423	- 8.6	21.6	15.8	11.0

(continued)

LABOR FORCE, EMPLOYMENT, EARNINGS

Labor Force

Civilian Labor Force By Sex & Age, 1975, 1985 & Middle Growth Projection for 1995

	Labor Force (thousands)			% Inc.	% of Population in the Labor Force		
	1975	1985	1995	1985/75	1975	1985	1995
Women, total	37,475	51,050	59,886	+36.2	46.3	54.5	58.9
16 to 19	4,065	3,767	3,307	- 7.3	49.1	52.1	51.2
20 to 24	6,185	7,434	6,316	+20.2	64.1	71.8	76.3
25 to 34	8,673	14,742	16,168	+70.0	54.9	70.9	81.1
35 to 44	6,505	11,567	16,943	+77.8	55.8	71.8	80.5
45 to 54	6,683	7,452	11,408	+11.5	54.6	64.4	71.3
55 to 64	4,323	4,932	4,695	+14.1	40.9	42.0	42.7
65 & over	1,042	1,156	1,049	+10.9	8.2	7.3	5.5
White	82,831	100,090	110,086	+20.3	61.5	64.9	66.8
Black	9,263	12,445	14,796	+34.3	58.8	62.8	65.8

Source: Bureau of Labor Statistics: Monthly Labor Review (November 1985); Employment & Earnings (January 1986)

Labor force representation of older workers, in general, is projected to drop substantially through 1995. For those 65 and over, rates have dropped for the entire century. Among those 55 to 64, the drop is a post-World War II phenomenon, due in great part to the expansion of pension coverage. However, there are indications that some large employers may be rethinking the desirability of their early retirement plans, and, too, a growing number are finding it advantageous to rehire retirees. These developments, and the growth in the use of temporary or part-time workers, and the diminishing supply of young workers, may change the pattern in labor force participation among older people.

Women in the Labor Force

In terms of age, the peak rate of participation in the labor force for women is in their late twenties; for men, in their early thirties. Looking ahead, participation in the labor force is expected to increase for younger women, but not for women over age 55, where the rate is expected to drop from 23% in 1975 to 19% by 1995 (according to middle projections by the BLS).

Among White women in the 30-to-45 age bracket the rate of labor force participation is expected to continue to increase over the next decade. These women and their spouses will have reached a point in their working lives when their earnings level off, and they will have to increase their time in the labor force if they are to maintain their living standard.

In 1975, just under 40% of the total labor force was composed of women; in 1985, 44.0%. This share is expected to grow to 46.4% by 1995. Up to 1990, according to the BLS, women will account for about 64% of the total growth in the size of the labor force; then the percent should start to fall as their participation rate slows.

LABOR FORCE, EMPLOYMENT & EARNINGS

Employment & Earnings Trends

A joint Economic Committee of Congress report released in December 1986 underscores the shift in employment in the U.S. to service-sector jobs -- a trend which Department of Labor projections indicate will continue to the end of this century. According to the Committee report, a net total of eight million new jobs was created from 1979 to 1984, but more than half paid less than $7,000 due to the heavy concentration in service jobs.

A Conference Board analysis looks for the economy to generate two million jobs in 1987, with about 90% of them in the service sector, and only 10% in goods-producing industries. Under pressure from competition from foreign producers, as well as developments in technology, manufacturer-related employment in 1986, averaging 19,187,000, accounted for 19.1% of total employees on nonagricultural payrolls, according to the Bureau of Labor Statistics. In 1980, manufacturing represented 22.4% of employment; in 1975, 23.8%. Service producing employment, on the other hand, accounted for 75.1% of the total in 1986; 71.6% in 1980; 70.6% in 1975.

The average national wage for manufacturer workers is about $9.86 an hour. Service workers generally average 85% of manufacturer wages, although within the service sector there is a wide range in the wage scale, from $11.76 an hour in transportation and public utilities down to $8.32 in business services; $6.05 in retail trade. In general, the increase in service jobs has been on the low end of the wage scale. A Federal Reserve Bank of Boston report shows that 41% of service workers now earn less than $15,000 a year.

Distribution of Manufacturing Jobs & Service Jobs
By Annual Earnings: 1986

Annual Earnings	Manufacturing	Service
Less than $15,000	28%	41%
$15,000 - $29,999	46	39
$30,000 or more	26	20
Total	100	100

Source: Economics Dept., Federal Reserve Bank of Boston

A growing demand for sophisticated services, requiring knowledge and skill; a more experienced service-worker supply, and hopefully improved productivity may help raise the level of service worker earnings. The future course is uncertain.

The Bureau of Labor Statistics compiled projections on employment in the U.S. in 1985, covering the outlook through 1995, covering three series, based on low, moderate and high macroeconomic assumptions. The moderate series looks for total employment to reach 123 million in 1995, 16 million more jobs than in 1984. Almost 9 out of every 10 of these new jobs will be added in a service-producing industry (transportation, communications, public utilities, trade, finance, insurance, real estate, miscellaneous services and government); the remainder in goods-producing jobs (manufacturing, construction, mining and agriculture).

Employment & Earning Trends (continued)

Broad changes are anticipated in the occupational structure of U.S. employment, which will have an effect on earnings. Blue-collar occupations are expected to decline over the 1984-1995 period. Executive, administrative and managerial workers are projected to increase by 22% compared with the 15% growth rate expected or total employment. Sales workers and service workers will increase from about 25% of the work force to over 35% in the 10-year period, however.

Total Civilian Employment By Broad Occupational Groups, 1984 & Projected 1995

	1984	1995	% Change in Number 1995/1984
Total employment (thousands)	106,842	122,760	+ 14.9
Percent	100.0%	100.0%	
Executive, administrative, managerial	10.6	11.2	+ 22.1
Professional workers	12.0	12.7	+ 21.7
Technicians & related support workers	3.0	3.4	+ 28.7
Salesworkers	10.5	19.9	+ 19.9
Administrative support workers, excluding clerical	17.5	16.7	+ 9.5
Service workers, except household	14.6	15.4	+ 21.3
Private household workers	0.9	0.7	- 18.3
Precision production, craft, repair workers	11.4	11.1	+ 11.7
Operators, fabricators, laborers	16.2	15.2	+ 7.3
Farming, forestry, fishing workers	3.3	2.8	- 3.0

Source: U.S. Bureau of Labor Statistics, Monthly Labor Review (Nov. 1985)

A factor in the growth in lower paying jobs has been the increase in part-time and temporary employment. Part-time workers numbered almost 21 million in 1986, representing 19% of total employment compared with 14% in 1975. Most (65%) of the part-time workers are women. Part-time work is a matter of choice for over nine out of 10 part-timers, many of whom may hold more than one job. Among women workers, 28% were working part-time in 1986 -- and 95% of these were part-timers by choice.

The total number of what are called "contingent workers" -- including part-timers, temporary workers, and the self-employed -- is currently estimated at about 30 million.

LABOR FORCE, EMPLOYMENT & EARNINGS

Current Employment

Employment Status of the Noninstitutional Population 16 Years & Over: 1980, 1986

(Annual average numbers in thousands)

	1986			1980		
	Total	Men	Women	Total	Men	Women
Population, total	182,293	87,349	94,944	169,349	80,877	88,472
In labor force (number)	119,540	66,973	52,568	108,544	62,932	45,611
Percent of population	65.6%	76.7%	55.4%	64.1%	77.8%	51.6%
Total employed	111,303	62,443	48,706	100,907	58,665	42,117
Civilian employment	109,597	60,892	48,054	99,303	57,186	41,461
Unemployed	8,237	4,530	3,707	7,637	4,267	3,370
Percent of labor force	6.9%	6.8%	7.1%	7.0%	6.8%	7.4%
Not in labor force	62,752	20,376	42,376	60,806	17,945	42,861

Source: U.S. Bureau of Labor Statistics

Women now hold about 44% of all jobs against 29% in 1950, according to a report just issued by the Council of Economic Advisers. However, women's average hourly pay is no higher in relation to men's than it was in the mid-1950's. In 1939, women were paid 58% as much as men, 64% in the mid-1950's, 58% again a decade later, now back to 64%. Younger women entering the work force, however, earn about 86% of what men do in comparable situations. Measured in constant 1985 dollars, women's average annual earnings rose from $11,000 in 1955 to $15,500 in 1973, fell to $14,500 by 1981 but rose to $16,000 in 1986.

Full- and Part-Time Employment By Sex and Age: 1986

(Numbers in thousands)

	Full-Time*			Part-Time**		
	Total	Men	Women	Total	Men	Women
Total, age 16 years & over	90,529	54,685	35,845	19,069	6,207	12,862
16 to 19 years	2,400	1,367	1,033	4,073	1,955	2,118
20 to 24 years	10,892	6,050	4,844	2,898	1,201	1,696
25 to 54 years	66,276	40,231	26,044	8,735	1,680	7,055
55 years and over	10,959	7,037	3,923	3,364	1,371	1,993

* Full-time employment numbers include workers who normally work full-time schedules but were employed part-time for economic reasons.
**Not including workers counted in accordance with above note (*).

Source: U.S. Bureau of Labor Statistics

Employment Status of Person in Families By Family Relationship: 1986

(Numbers in thousands)

	Civilian Labor Force					
				Unemployed		Not in
	Total	% of Population	Employed	Number	%	Labor Force
Total, 16 years & over*	96,304	65.8%	89,478	6,826	7.1	50,115
Husbands	39,423	78.5	37,775	1,648	4.2	10,812
With employed wife	24,068	91.7	23,173	890	3.7	2,184
Wives	27,605	55.0	26,247	1,357	4.9	22,631
With employed husband	24,255	64.2	23,173	1,082	4.5	13,520

(continued)

LABOR FORCE, EMPLOYMENT & EARNINGS

Current Employment

Employment Status of Person in Families By Family Relationship: 1986
(Numbers in thousands)
(continued)

	Civilian Labor Force					
	Total	% of Population	Employed	Unemployed Number	Unemployed %	Not in Labor Force
Relatives in married-couple families:						
16 to 19 years old	5,291	54.9	4,478	814	15.4	4,347
20 to 24 years old	5,199	78.4	4,636	563	10.8	1,436
25 years and over	3,327	65.0	2,970	357	10.7	1,789
Women who maintain families	6,394	61.7	5,763	631	9.9	3,970
Men who maintain families	1,933	76.7	1,777	156	8.1	589

* Excludes persons living alone or with nonrelatives, persons in married-couple families where the husband or wife is in the Armed Forces, and persons in unrelated subfamiles.

Source: U.S. Bureau of Labor Statistics

Arizona, Tennessee, Nevada and Florida are leading the Nation in producing new jobs, while 11 states with economies dependent on energy or agriculture have fewer people at work than a year ago, according to the BLS. States losing over 2% of their jobs over the previous 12 months included Alaska, Idaho, Louisiana, Montana, Oklahoma and Wyoming. The lowest unemployment rates are in four New England States: New Hampshire (2.4%), Connecticut and Rhode Island (3.3% each) and Massachusetts (3.4%).

Average Hourly & Weekly Earnings of Production or Nonsupervisory Workers On Private Nonagricultural Payrolls: December 1985, 1986

	Average Hourly Earnings		Average Weekly Earnings	
	Dec. 1986	Dec. 1985	Dec. 1986	Dec. 1985
Total private	$ 8.85	$ 8.71	$ 308.87	$ 306.59
Mining	12.64	12.27	533.41	537.43
Construction	12.71	12.47	470.27	460.14
Manufacturing	9.86	9.74	411.16	406.16
Durable goods	10.44	10.34	442.66	439.45
Nondurable goods	9.05	8.87	368.34	359.24
Selected types:				
Textile mill products	7.12	6.83	301.18	283.45
Apparel & related prods.	5.86	5.80	219.75	215.18
Transportation & public utilities	11.76	11.61	460.99	460.92
Wholesale trade	6.02	5.99	176.99	178.50
Finance, insurance, real estate	8.56	8.15	310.98	298.11
Services	8.31	8.12	269.24	266.33

Source: U.S. Bureau of Labor Statistics

LABOR FORCE, EMPLOYMENT & EARNINGS

Employment By Occupation

As of November 1986, the number of women employed in managerial and professional specialties totaled 11,524,000, representing 38.6% of all female employment in nonfarm, civilian occupations, and about 44% of total employment in this job classification. In 1984, employment of women in managerial and professional specialties averaged 10,329,000, representing 22.5% of female employment, and 41.5% of all employment in this classification.

Following is a summary of employment by occupations as of November 1986 compared with November 1985.

Employment By Occupation: November, 1985, 1986
(Numbers in thousands)

	Total	Men	Women
Total, age 16 and over*	103,679	56,300	47,379
Managerial, professional	26,328	14,804	11,524
Executive, administrative, managerial	12,460	7,734	4,727
Professional specialty	13,867	7,071	6,797
Technical, sales, admin. support	33,776	11,844	21,931
Service occupations	14,223	5,600	8,623
Precision production, craft, repair	13,018	11,935	1,083
Operators, fabricators, laborers	16,334	12,116	4,218

* Excludes farming, forestry and fishing occupations.

Source: U.S. Bureau of Labor Statistics

INCOME/WEALTH

Personal Income/Outlay Profile

Personal income in 1986 amounted to $3,487 billion, according to preliminary data, representing an increase of 5.2%, following the 6.6% rise in 1985 compared with 1984. Personal outlays rose 6.4% after a 7.3% rise. Adjusted for inflation, disposable personal income increased 3% after the 2.3% rise in 1985. The spending spree toward the end of the year, spurred by the repeal of sales tax deductions effective in 1987, brought the savings rate to only 3.9% of after-tax income -- the lowest level since 1947's 3.1% rate, and comparing with the 5.1% rate in 1985. The low level of consumer savings, plus the high level of debt, and slower growth in earnings indicate a slowdown in consumer spending in 1987.

In the overall profile of income, it is noted that wages and salaries are accounting for a diminishing share of personal income. They represented 59.5% in 1986, down from 60.7% in 1980, 66.3% in 1970. However, within this framework, service industry wage/salary share rose to 16.2% in 1986 from 15.6% in 1985 and 13.5% in 1980.

Personal interest income's share of total income dropped to 13.6% in 1986, down from 14.4% in 1985; while dividend income held at 2.3%. The drop in interest rates is affecting buying power of many older citizens who rely on this source of income to a greater extent than younger consumers.

Personal Income/Outlay Profile

Personal Income by Source & Outlays: 1980, 1985, 1986
(Billions of current dollars, except where noted)

				% of Total		
	1986(p)	1985(r)	1980	1986	1985	1980
Personal income	$3,487.0	$3,314.5	$2,258.5	100.0	100.0	100.0
Wages & salaries	2,073.8	1,966.1	1,372.0	59.5	59.3	60.7
Commodity-producing inds.	623.3	607.7	470.7	17.9	18.3	20.8
Manufacturing	471.3	460.1	355.6	13.5	13.9	15.7
Distributive industries	488.0	469.8	335.5	14.0	14.2	14.8
Service industries	566.8	516.4	305.6	16.2	15.6	13.5
Government & government enterprises	395.7	372.2	260.2	11.3	11.2	11.5
Other labor income	208.8	196.9	138.4	6.0	5.9	8.7
Proprietors' income*	278.9	254.4	180.7	8.0	7.7	11.3
Rental income of persons*	15.6	7.6	6.6	0.4	0.2	0.3
Personal dividend income	81.2	76.4	52.9	2.3	2.3	2.3
Personal interest income	475.4	476.2	271.9	13.6	14.4	12.0
Transfer payments**	513.7	487.1	324.7	14.7	14.7	14.4
Less: Personal contributions for social insurance	160.3	150.2	88.6	4.6	4.5	3.9
Personal tax & non-tax payments	513.4	486.5	340.5	14.7	14.7	15.1
Equals: Disposable personal income	2,973.7	2,828.0	1,918.0	85.3	85.3	84.9
Less: Personal outlays	2,857.4	2,684.7	1,781.1	81.9	81.0	78.9
Personal consumption expenditures	2,762.4	2,600.5	1,732.6	79.2	78.5	76.7
Interest paid by consumers to business	93.6	82.6	47.4	2.7	2.5	2.1
Personal transfer payments to foreigners (net)	1.4	1.6	1.1	#	#	#
Equals: Personal saving	116.3	143.3	136.9	3.3	4.3	6.1
Addenda:						
Disposable personal income:						
Total, billions of 1982 dollars	2,603.7	2,528.0	2,214.3	--	--	--
Per capita:						
Current dollars	12,312	11,817	8,421	--	--	--
1982 dollars***	10,780	10,563	9,722	--	--	--
Population (millions)	241.5	239.3	227.8	--	--	--
Personal saving as a % of disposable income	3.9	5.1	7.1	--	--	--

(p) preliminary
(r) revised
* Inventory valuation and/or capital consumption adjustments are included.
** Transfer payments include old-age, survivors', disability and health insurance benefits; government insurance benefits, etc.
*** Disposable income in 1982 dollars equals the current-dollar figure divided by the implicit price deflator for personal consumption expenditures.
# Less than 0.1%

Source: U.S. Department of Commerce, Bureau of Economic Analysis

INCOME/WEALTH

Personal Income/Outlay Profile

Pending tax changes spurred spending on cars in 1986. Excluding these sales, retail sales were up 4.5% after adjustment for inflation. This rate, according to a consensus among economists and securities analysts, may slow to something less than 3% in 1987, rising not more than 4%. Record high personal debt, slower income growth and somewhat steeper energy prices will be factors in holding down consumer spending. General merchandise sales (soft goods) will generally do better, it is expected, than cars, furniture and appliances, rising up to 4%.

However, consumers -- mainly lower and middle income wage earners -- will be getting additional take-home pay due to tax cuts (with the total estimated as high as $11.5 billion). How much of this will go to pay off debts, how much to savings, how much to spending for goods and services remains to be seen.

Unreported Income

The "underground economy" in the U.S. represents such a large slice of national income that it cannot be ignored. This is a huge amount of income that goes unreported to escape taxation, or criminal charges, or both. In current dollars, the amount of unreported cash going underground grew from an average of $52.2 billion a year in 1971-75 to an average of $370.7 billion a year in 1981-85, according to estimates compiled by James J. O'Leary, economic consultant to the United States Trust Co.

According to this source, the total reached a peak of $558.4 billion in 1984, dropping to $431.7 billion in 1985, due in part to stricter IRS requirements for banks and other financial institutions to report interest and dividends. Much of the unreported income comes from drug dealing, burglaries, illegal gambling and other criminal activities, but much of it is unreported or collected "off the books" in businesses and professions. The rapidly growing service sector has offered increasing opportunities to deal in cash.

Poverty Levels

An experimental series of estimates by the Census Bureau regarding the U.S. poverty population, designed to include the value of noncash benefits, was reported in October 1986. This study concluded that the number of Americans living in poverty ranged from 21.5 million to 30.4 million in 1985, reflecting a poverty rate of between 9.1% and 12.8% of the population. The poverty threshold excluding noncash benefits is currently $10,989 in cash income for a family of four, and on that basis an earlier report by the Census Bureau had put the poverty rate at 14%.

Per Capita Income

From 1975 to 1985 per capita income in real terms, eliminating the effects of inflation, had increased about 1.2% a year. In 1985, per capita money income in the U.S. was $11,010, up 2.1% (in real terms) from 1984. For Whites, it was $11,670 (up 2.0%); for Blacks, $6,840 (up 4.9%); for Spanish-origin persons, it was $6,610, unchanged from 1984. Measured in 1985 dollars, per capita income in 1980 averaged $10,166; in 1975, $9,630; in 1970, $8,802.

Money Income of Individuals

Counting money income from all sources, (earnings and other income) men in the 45-54 age group registered the highest median -- $25,845 in 1985 compared with an overall median of $16,311 for all men age 15 years and older. However, the 35-44 age bracket, which covers the leading edge of the baby boom generation, registered the largest number of men with median incomes of $30,000 to $49,999 and incomes of $50,000 or more in 1985.

Among women with their own incomes, the highest median by age group was for those in the 35-44 bracket ($10,275); and this group also had the biggest number of women with incomes upwards of $30,000 in 1985.

Among women age 65 & over, 15.8 million had their own income (98.5%) of all women in this age category, but the median income was only $6,313. Among men of this age about 11.2 million had their own incomes (99.1% of the total number of men age 65 plus) and their median income was $10,900. Government statistics indicate that taxpayers age 65 and over receive about half of all interest income reported on tax returns. The sharp drop in interest rates in recent months is beginning to affect consumption of discretionary items by senior citizens.

Number & Percent of Men & Women Age 15 Years & Over
By Total Money Income: 1985

(Numbers in thousands)

		Age Groups (years)						
	Total	15-19	20-24	24-34	35-44	45-54	55-64	65 & over
MALES, total	88,474	9,183	9,788	20,956	15,955	10,970	10,350	11,272
With income	83,631	6,204	9,199	20,464	15,694	10,768	10,131	11,171
Under $10,000	26,702	5,871	5,125	4,230	2,326	1,684	2,384	5,081
$10,000-$19,999	22,266	298	3,053	6,789	3,388	2,252	2,612	3,876
$20,000-$29,999	15,428	25	831	5,192	3,852	2,391	1,961	1,179
$30,000-$49,999	13,978	8	146	3,532	4,472	2,975	2,170	676
$50,000 & over	5,257	2	45	723	1,656	1,466	1,003	361
Median income	$16,311	$1,893	$ 8,629	$18,662	$25,358	$25,845	$20,257	$10,900
Mean income	$20,652	$2,987	$10,237	$20,715	$28,455	$29,756	$25,335	$14,940
MALES, total %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
With income	94.5	67.5	94.0	97.6	98.4	98.2	97.9	99.1
Under $10,000	30.2	63.9	52.4	20.2	14.6	15.3	23.0	45.1
$10,000-$19,999	25.2	3.2	31.2	32.4	21.2	20.5	25.2	34.4
$20,000-$29,999	17.4	4.0	8.5	24.8	24.1	21.8	18.9	10.4
$30,000-$49,999	15.8		1.5	16.8	28.0	27.1	21.0	6.0
$50,000 & over	5.9		0.4	3.4	10.4	13.4	9.7	3.2

(continued)

Money Income of Individuals

Number & Percent of Men & Women Age 15 Years & Over By Total Money Income: 1985

(Numbers in thousands)
(continued)

		Age Groups (years)						
	Total	15-19	20-24	24-34	35-44	45-54	55-64	65 & over
FEMALES, total	96,354	9,091	10,160	21,096	16,552	11,692	11,712	16,050
With income	86,531	5,790	9,150	19,300	15,271	10,612	10,603	15,805
Under $10,000	68,411	5,584	6,386	9,723	7,484	5,434	6,421	11,530
$10,000-$19,999	21,359	188	2,407	6,023	4,226	3,009	2,520	2,986
$20,000-$29,999	8,707	17	309	2,607	2,402	1,461	1,097	812
$30,000-$49,999	3,218	2	39	813	973	587	432	371
$50,000 & over	686	--	7	134	185	121	133	106
Median income	$ 7,217	$1,796	$ 6,155	$ 9,879	$10,275	$ 9,619	$ 7,173	$ 6,313
Mean income	$10,173	$2,595	$ 7,400	$11,591	$12,705	$11,942	$10,478	$ 8,982
FEMALES, total %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
With income	89.8	63.7	90.0	91.5	92.3	90.8	90.5	98.5
Under $10,000	71.0	61.4	62.8	46.1	43.2	46.5	54.8	71.8
$10,000-$19,999	22.2	2.1	23.7	28.5	25.5	25.7	21.5	18.6
$20,000-$29,999	9.0	0.2	3.0	12.4	14.5	12.5	9.4	5.6
$30,000-$49,999	3.3		0.4	3.9	5.9	5.0	3.7	2.3
$50,000 & over	0.7	--	0.1	0.6	1.1	1.0	1.1	0.7

* The number of civilian men with earnings (from work) was 67.8 million; their median earnings were $17,779. For women, comparable figures were 56.3 million, and $9,328.

Source: U.S. Bureau of the Census: Current Population Reports, Money Income & Poverty Status of Families & Persons in the U.S. (Advance data from the March 1986 Current Population Survey (P-60, No. 154)

Money income is highly concentrated among young adults. Based on Census data covering average incomes by age groups within the population over 14 years, 50.3% of male income was in the hands of men age 25 to 44 years (40.8% of the male population age 15 and over). Comparable figures for women showed an estimated 47.4% of female income concentrated among women age 25 to 44 years (35.8% of the female population age 15 and over). The 25-44 age category is the one that will grow fastest in the years ahead as the baby boomers age. The first batch reached age 40 in 1986.

Money Income of Individuals

Share of Total Income of Individuals Age 15 & Over By Sex & Age Group: 1985

(Numbers in thousands, income in billions of $)

	Men				Women			
	Number	%	Income	%	Number	%	Income	%
Total	88,474	100.0	$1,730.0	100.0	96,354	100.0	$880.2	100.0
With no income	4,843	5.5	--	--	9,822	10.2	--	--
With income	83,631	94.5	--	--	86,531	89.8	--	--
Age group: (years)								
15 - 19	6,204	7.0	18.5	1.1	5,790	6.0	15.0	1.7
20 - 24	9,199	10.4	94.2	5.4	9,150	9.5	67.7	7.7
25 - 34	20,464	23.1	423.9	24.5	19,300	20.0	223.7	25.4
35 - 44	15,694	17.7	446.6	25.8	15,271	15.8	194.0	22.0
45 - 54	10,768	12.2	320.4	18.5	10,612	11.0	126.7	14.4
55 - 64	10,131	11.4	256.7	14.8	10,603	11.0	111.1	12.6
65 & over	11,171	12.6	169.8	9.8	15,805	16.4	142.0	16.1

Source: Based on U.S. Bureau of the Census reports

Regional Distribution & Household Status of Individuals With Income: 1985

(Numbers in thousands)

	Men			Women		
	Number	%	Median Income	Number	%	Median Income
U.S. total	83,631	100.0	$16,311	86,531	100.0	$7,217
Northeast	17,519	20.9	17,581	19,011	22.0	7,543
Midwest	20,775	24.8	16,377	21,654	25.0	6,853
South	28,213	33.7	14,935	29,090	33.6	6,795
West	17,124	20.5	17,390	16,776	19.4	8,115
Household status:						
In families	69,397	83.0	16,570	69,428	80.2	6,513
Householder (head)	50,036	59.8	21,106	12,706	14.7	9,286
Spouse of householder	2,860	3.4	18,321	43,184	49.9	6,820
Other relative	16,501	19.7	4,884	13,538	15.6	3,922
Unrelated subfamilies	186	2.2	8,390	451	0.5	6,675
Unrelated individuals	14,048	16.8	15,275	16,652	19.3	10,120

Source: U.S. Bureau of the Census: Current Population Reports, Money Income & Poverty Status of Families & Persons In the U.S. (P-60, No. 154)

The Wealthiest Individuals

In 1985, the number of men with incomes of $50,000 or more totaled 3,588,000 (1,669,000 of these had incomes of $75,000 or more), according to the Census Bureau. Among women 686,000 had incomes of $50,000 and up; 1,669,000 were in the $75,000-and-over category.

INCOME/WEALTH

Household Income

The major source of income of American households is from earnings from employment -- accounting for $78 of every $100, according to the Department of Commerce. The three other most important sources of income for households are interest, dividends and other asset income. Asset income provided about $8 out of every $100 received. Social Security provided about $7, and other pensions about $4; miscellaneous sources, $3 in 1985.

Total money income of the Nation's 88,458 households in 1985 had a median value of $23,618, a mean of $29,066 in current dollars. The median was 5.4% above the 1984 figure and a third higher than in 1980, in terms of current dollars. In constant dollars, the 1985 figure was about 5.3% above the 1980 total.

Distribution of Households in March 1986 By Total Money Income, 1985
By Region of the U.S.
(Numbers in thousands)

	U.S. Total	Northeast	Midwest	South	West
Total number	88,458	18,562	21,847	30,311	17,738
Money Income					
Under $15,000	27,929	5,502	6,824	10,687	4,917
$10,000-$14,999	10,149	1,983	2,458	3,851	1,857
15,000- 19,999	9,674	1,873	2,387	3,519	1,895
20,000- 24,999	8,839	1,731	2,301	3,026	1,782
25,000- 29,999	8,042	1,617	2,101	2,678	1,646
30,000- 34,999	6,965	1,491	1,818	2,225	1,430
35,000- 39,999	5,739	1,235	1,514	1,823	1,166
40,000- 49,999	8,208	1,940	1,973	3,464	1,831
50,000- 74,999	9,134	2,148	2,187	2,752	2,046
75,000 & over	3,927	1,025	742	1,137	1,023
Median income	$23,618	$25,485	$23,551	$21,397	$25,782
Mean income	29,066	31,146	28,149	27,044	31,475

Source: U.S. Bureau of the Census, Current Population Reports (Series P-60, No. 154)

Median Household Income By Age of Householder in 1984
By Region of the U.S.

		Age of Householder*					
	Total	Under 25 Years	25-34	34-44	45-54	55-64	65 & Over
Total households	22,415	$14,028	$23,735	$29,784	$31,516	$24,094	$12,799
Northeast	23,550	12,551	25,017	30,672	32,330	26,183	13,027
Midwest	22,586	13,471	23,821	29,876	31,978	25,101	12,943
South	20,625	13,874	22,113	27,993	29,916	20,999	11,710
West	24,457	15,997	25,358	31,076	32,862	26,077	14,651

* The householder is defined as the first person listed in whose name the home is owned or rented.

Source: U.S. Bureau of the Census, Current Population Reports (Series P-60, No. 151)

Household Income (continued)

Relative household income patterns by age have changed over the past 20 years, reflecting shifts in relative unemployment rates and earnings, changes in living arrangements and in the age distribution of the population. The income of households headed by a young person declined from about 62% of the median for the 45-54 age group in 1967 to about 45% in 1984. The reason lies partly in the lower relative earnings of baby-boom workers, but also in the sharp increase in the number of single persons living alone, who are often young and usually have household income lower than than in households with two or more persons.

For households headed by 25-to-34-year-olds, relative income has declined since the late 1960's, reflecting the lower relative earnings of baby-boom workers currently of this age. A substantial rise in the proportion of households with more than one earner -- from about 45% in the late 1950's and early 1960's to nearly 70% by the early 1980's -- has kept this decline from being even greater.

Unlike the baby-boom generation, elderly people have improved their income position even though more of them are living alone. The relative income for households with heads aged 65 and over rose from 30% of the median for households with heads aged 45 to 54 in 1967 to more than 40% in 1984, according to an analysis of Census Bureau data by the Federal Reserve Board.

Relative Household Income, By Age of Head
Selected Years: 1967-1984

	Percent of median income of households with heads aged 45-54		
Age of head	1967	1975	1984
Under 25	61.7%	50.7%	44.5%
25-34	88.1	79.4	75.3
35-44	98.9	96.0	94.5
45-54	100.0	100.0	100.0
55-64	76.5	77.6	76.5
65 & over	30.3	35.6	40.6

Source: Federal Reserve Board based on U.S. Bureau of the Census, Current Population Reports

Income Distribution

Changes in the age distribution of the population have influenced the proportion of total household income received by each age group (based on age of householder or head). The percentage of total income received by households with younger heads rose between 1967 and 1975 despite the worsening of their relative income because of their large number. As this dwindled in the late 1970's, and early 1980's, their share of total income fell to less than 4%. In contrast the share for households whose head is 25 to 44 has risen, reflecting the maturing of the baby-boom cohort. In addition, the share of income received by households with elderly heads has risen steadily because their numbers have increased and their relative income has improved.

INCOME/WEALTH

Income Distribution

Distribution of Household Income, By Age of Head
Selected Years: 1967-1984

Age of head	Percent of income received by all households 1967	1975	1984
Under 25	4.6%	5.3%	3.8%
25-34	18.3	21.2	22.0
35-44	23.9	20.7	24.5
45-54	25.1	22.9	19.1
55-64	17.4	17.7	16.7
65 & over	10.8	12.2	13.9
All household income	100.0	100.0	100.0

Source: Federal Reserve Board based on U.S. Bureau of the Census, Current Population Reports

The current youth group -- the baby bust generation -- is favored in finding entry-level positions due to their small number, and their size should help boost incomes as they mature and competition for workers increases. In contrast, members of the baby-boom generation will continue to face intense competition in the labor market as they age, due to their number.

As of March 1985, there were 60,784,000 children under 18 years of age living with one or both parents. The mean family income for all of these children was $28,061. However, for the 46,149,000 children under 18 (76% of the total) living with both parents, the mean was $33,182.

Almost 23% of the children under 18 were in families with incomes of $40,000 or more. Older children are more likely to have parents who have moved up the earnings scale. Among those age 12 to 17 years, almost 30% were in families with annual income upwards of $40,000; about 18% were in families with incomes of $50,000 or more compared with only about 9% of the children under six.

Distribution By Family Income in 1985
Of Children Under 18 Years of Age Living With One or Both Parents
(Numbers in thousands)

	Total Under 18		Under 6 Yrs.		6 to 11 Yrs.		12 to 17 Yrs.	
Family Income	No.	%	No.	%	No.	%	No.	%
Under $10,000	12,242	20.1	5,245	24.9	3,781	19.8	3,215	15.6
$10,000-$14,999	6,210	10.2	2,383	11.3	1,929	10.1	1,898	9.2
$15,000-$24,999	12,373	20.4	4,462	21.2	4,044	21.1	3,868	18.7
$25,000-$39,999	16,117	26.5	5,454	25.9	5,145	26.9	5,520	26.8
$40,000-$49,999	6,213	10.2	1,712	8.2	2,005	10.5	2,496	12.1
$50,000 & over	7,628	12.6	1,782	8.5	2,209	11.6	3,636	17.6
Mean average	$28,061		$24,413		$27,751		$32,006	
Number of children	60,784	100.0	21,039	100.0	19,114	100.0	20,631	100.0

Source: U.S. Bureau of the Census, Current Population Reports, Marital Status and Living Arrangements: March 1985 (Series P-20, No. 410)

Income Distribution

The distribution of households in terms of income after taxes varies considerably from the pre-tax line-up. According to a Census Bureau analysis, the median income of all U.S. households after taxes in 1984 was $18,530 (compared with $22,415 before taxes). The percent of households with income of $50,000 or more dropped from 12.8% before taxes to 5.1% after taxes. Among households paying taxes which were in the $50,000-plus income group, 28.1% of their money income went for taxes in 1984.

Number and Percentage of Households, By Before and After Tax Income: 1984
(Numbers in thousands)

Household Income	Before Taxes		After Taxes	
	Number	Percent	Number	Percent
Total	86,789	100.0	86,789	100.0
Under $10,000	18,356	21.1	21,394	24.3
$10,000 - $14,999	10,557	12.1	13,362	15.3
$15,000 - $19,999	9,872	11.4	12,604	14.5
$20,000 - $24,999	9,012	10.4	10,778	12.4
$25,000 - $29,999	8,021	9.2	8,716	10.0
$30,000 - $34,999	6,643	7.7	6,354	7.3
$35,000 - $39,999	5,430	6.3	4,462	5.1
$40,000 - $44,999	4,472	5.2	3,077	3.5
45,000 - $49,999	3,346	3.9	1,908	2.2
$50,000 & over	11,080	12.8	4,432	5.1
Median income	$22,415	--	$18,530	--
Mean income	$27,464	--	$21,564	--
Income per household member	$10,207		$ 8,015	

Source: U.S. Bureau of the Census, Current Population Reports: After-Tax Money Income of Households: 1984 (P-23, No. 147)

The growing polarization of the U.S. market is one of increasing concern to economists, as well as marketers who must change their strategies. At the top is a growing overclass of well-educated, two-income families, at the bottom is a growing underclass of single mothers, baby-boomers stuck in low-paying jobs and children living in poverty. Between them is a middle class that has stopped growing.

In 1985, the top fifth of American families (those earning more than $48,000) got 43% of all family income, a post-war high. The bottom fifth (those earning less than $13,200) got 4.7%, the least in 25 years. Families earning $15,000 to $35,000 a year, (adjusted for inflation) fell to 39% of the 1985 total from 46% in 1970. Some economists expect this trend to continue as the economy is not producing as many middlewage jobs as it once did; others expect the pattern to reverse as the disrupting effects of the baby boom on family composition pass on. No matter what, the working wife is moving millions of families out of the middle class.

INCOME/WEALTH

Income Distribution

On a household income basis, those with incomes of $50,000 or more are reported to control a third of all personal income, according to The Conference Board, a business research group. By the year 2000, according to this source, 40% to 50% of personal income will be in the hands of those with inflation-adjusted income of $50,000 or more. Manufacturers and retailers to an increasing extent are focusing their attention on the upscale market, while some, such as Wal-Mart, are concentrating on the lower income group. Stores such as Gimbels and Ohrbachs, which focused on middle-income consumers, have had to close.

The impact of tax cuts to be phased in as of 1987 is a question, but they are expected to add some $11.5 billion in total personal income. The pattern in income distribution will still show over 40% of annual money income going to the top 20% of households, however.

In a study of discretionary income -- the amount of money households have left after paying taxes and normal household expenses -- by The Conference Board and the Census Bureau in 1985, it was found that about a third of U.S. households had incomes above that required for a "comfortable" standard of living. This discretionary income represented about 16% of all household income after taxes. Average income after taxes for households that had discretionary income was $34,560 (compared to a national average of $20,350 for all households in 1984). Half the discretionary income was held by the age 50-and-over market; 63% was held by households with two or more persons earning a paycheck.

Net Worth

A first-time report on household wealth and asset ownership was issued in July 1986 by the Census Bureau, based on information collected in September through December 1984. Median net worth was reported at $32,670, distributed as noted below.

Household Ownership of Assets & Distribution of Total Net Worth: 1984

	% of Households Owning Asset Type	Median Value of Holding	Distribution of Net Worth
All assets	--	$ 32,670	100.0
Interest-earning accounts (Savings, money market, deposits, CD's, etc.)	71.8	3,066	14.4
Other interest-earning assets (money market funds, govt. securities, bonds, etc.)	8.5	9,471	3.1
Checking accounts	53.9	449	0.6
Stocks & mutual fund shares	20.0	3,892	6.8
Own home	64.3	40,597	41.3
Rental property	9.8	34,556	9.0
Other real estate	10.0	14,791	4.4
Vehicles	85.8	4,104	6.0
Business or profession	12.9	6,298	10.3
U.S. savings bonds	15.0	300	0.5
IRA or KEOGH accounts	19.5	4,805	2.2
Other financial investments	6.9	12,789	4.9

(continued)

Net Worth

Housholds Owning Selected Asset Types By Household Annual Income

	% of Households By Income				Median Value of Holding By Income			
	Under $10,800	$10,800-23,999	$24,000-47,999	$48,000 & More	Under $10,800	$10,800-23,999	$24,000-47,999	$48,000 & More
Interest-earning accounts	47.7	70.3	84.7	92.7	$ 1,931	$ 2,490	$ 2,770	$ 7,351
Other interest-earning assets	2.7	6.3	9.8	22.7	8,715	9,746	5,997	11,635
Stocks/mutual funds	6.4	13.5	26.1	49.2	3,427	3,379	2,727	6,466
Equity in own home	42.5	60.4	76.4	88.7	29,355	36,392	41,599	63,439
Vehicles	62.3	89.5	96.9	97.2	1,978	3,208	5,040	7,597
Business/profession	7.9	10.5	14.2	26.0	3,277	3,986	5,249	22,713
IRA/KEOGH accounts	4.5	11.7	26.4	52.8	4,129	4,229	4,429	6,616

Median Net Worth by Age of Householder & Monthly Household Income

(Number of households in thousands)

	Age of Householder			
	Under 35	35-44	45-54	55-64
All households (no.)	25,730	17,393	12,596	12,920
Median income	$ 1,596	$ 2,238	$ 2,381	$ 1,822
Median net worth	5,764	35,581	56,791	73,664
Excl. home equity	2,966	7,557	12,655	22,073
Income under $900/mo.:				
Households (no.)	6,973	2,775	1,864	2,751
Median net worth	$ 855	$ 2,147	$ 6,662	$23,587
Excl. home equity	626	683	869	2,470
Income $900-$1,999/mo.:				
Households (no.)	8,916	4,305	2,842	3,865
Median net worth	$4,686	$16,533	$28,719	$60,232
Excl. home equity	2,531	3,690	5,281	14,983
Income $2,000-$3,999/mo.:				
Households (no.)	8,150	7,233	4,851	4,137
Median net worth	$15,343	$44,421	$63,236	$88,454
Excl. home equity	5,851	9,426	13,144	30,452
Income $4,000/mo. & up				
Households (no.)	1,691	3,081	3,039	2,166
Median net worth	$44,424	$92,713	$138,981	$197,603
Excl. home equity	18,158	32,607	45,740	88,437

* Base is less than 200,000 households.

(continued)

Net Worth (continued)

Median Net Worth by Age of Householder & Monthly Household Income
(Number of households in thousands)
(continued)

	Age of Householder			
	65+ Total	65-69	70-74	75 & Over
All households (no.)	18,151	5,668	5,014	7,468
Median income	$ 1,021	$ 1,306	$ 1,022	$ 828
Median net worth	60,266	66,261	60,573	55,178
Excl. home equity	18,790	21,502	18,455	17,025
Income under $900/mo.:				
Households (no.)	7,934	1,702	2,167	4,064
Median net worth	$25,863	$23,257	$23,578	$28,986
Excl. home equity	3,727	2,468	3,488	4,634
Income $900-$1,999/mo.:				
Households (no.)	6,672	2,428	1,933	2,310
Median net worth	$74,775	$68,509	$75,188	$80,044
Excl. home equity	29,849	22,412	27,718	41,343
Income $2,000-$3,999/mo.:				
Households (no.)	2,802	1,185	696	921
Median net worth	$162,900	$151,450	$164,048	$175,949
Excl. home equity	80,327	73,618	81,060	97,146
Income $4,000/mo & up				
Households (no.)	743	354	217	172
Median net worth	$344,518	$247,105	$410,252	*
Excl. home equity	212,710	156,751	268,515	*

* Base is less than 200,000 households.

Source: U.S. Bureau of the Census, Current Population Reports: Household Economic Studies: Household Wealth & Asset Ownership; 1984 (Series P-70, No. 7)

In August 1986, the Democratic staff of the Joint Economic Congressional Committee issued a corrected report covering an earlier version outlining findings on the control of wealth by American families. This study was based on $10 trillion in total household wealth in 1983 (not including pension fund assets valued at $1.3 to $1.5 trillion).

The study shows the high concentration of wealth among the richest households -- 0.5% of all families owned 26.9% of total household wealth (up from 25% in 1963); 90% of families had a 32.1% share of wealth in 1983, down from 36% in 1963.

Net Worth (continued)

Distribution of Total Wealth Among American Families: 1983

	Percent of Total Wealth	
	1983	1963
Top 0.5% of families	26.9%	25.0%
Second 0.5% of families	7.4	6.6
Next 9.0% of families	33.6	32.4
Remaining 90% of families	32.1	36.0

Source: Joint Economic Committee of Congress (Aug. 1986)

Of the $2.8 trillion worth of outstanding equities at the end of 1985, more than 60% was held by the household sector, but households hold only 10% to 15% of corporate and Treasury bonds (excluding savings bonds).

Much has been said about the "wealth effect" of the recent sharp run-up in the stock market, with the assumption that consumers will feel wealthier and be encouraged to increase their spending. This may be true; however, the survey of consumer finances indicates that only 20% of families own stock either directly or through mutual fund, and only 3% to 4% own bonds. Furthermore, families in the top 10% of income -- those with at least $48,000 in money income in 1984 --own about 85% of all stocks in the household sector, 92% of the municipal bonds, 80% of mutual fund shares and 72% of other bonds. these families have the highest savings rate (averaging 28%); they are already rich, and new wealth is unlikely to change their consumption behavior.

Taking a realistic view of household assets, there are problems looming. For example, the real value of home equity -- which makes up the bulk of most household's net worth -- has actually declined as mortgage debt has soared. The collapse in prices of oil, farmland, office buildings and other property has had a detrimental effect on corporate equity -- including proprietorships and partnerships -- that are the mainstay of the upper middle class. According to the Federal Reserve Board, the real net worth of tangible assets, such as plant, equipment, and inventories, has also been falling -- and this is expected to ultimately be reflected in falling values of financial assets.

SAVINGS

The savings rate in 1986 sank to a rate of only 3.1% of disposable personal income, down from 5.1% in 1985 and 7.1% in 1980. This was the lowest rate registered since 1947 (3.1%). the sharp rise in the stock market, and the wealth effect this has in making consumers feel better, even if they are not stock holders, is expected to be a factor in keeping the rate low. Other factors include a switch to investing in the stock market because of its promise for gain, as well as the decline in corporate contributions to private pension plans (which are counted as deferred personal income that is saved).

SAVINGS

The demographics of the population have an effect on patterns of consuming and saving. As individuals age and the size of their family changes, savings and outlays vary in a systematic way. Younger people save relatively less than older ones, as they have greater demands for durable goods and educational expenses for themselves. As they age, saving for the education of children and for retirement years increases. Finally, the elderly typically save less out of current income as they often use accumulated assets for living expenses. While the baby boomers have matured into higher-saving age groups, their impact on savings has been offset by an increase in the elderly population. Changes in living arrangements are also keeping savings down, particularly the growth of single-person households, a group that as a whole tends to have a low savings rate, and which also include a large proportion of people in the lower half of income distribution.

DEBT

The growth and deteriorating quality of private debt, along with the record-shattering budget deficits and pileup of federal debt, are a matter of concern to economists, although most do not see a recession in the near future.

As a percentage of disposable income, household debt reached close to 31% in 1986, compared with less than 26% in 1980. Household liabilities have risen faster than household assets, and servicing this burden of debt absorbs about one-third of after-tax income. Delinquency rates on consumer installment loans are rising, particularly in the farm belt. A recent government estimate showed about 36% of 261,000 borrowers from the Farmers Home Administration behind in their payments. Home foreclosures are also on the rise. The current percentage, at close to 1% of the total outstanding, has nearly doubled in the past four years to a postwar high.

The level of personal debt of all types outstanding is reported by the Federal Reserve Board as follows (billions of dollars):

	End of 3rd Quarter		End of	% Change 3rd Quarter
	1986	1985	1983	1986/85
Mortgage debt, all holders	$2,456.9	$2,200.6	$1,813.9	+ 11.6%
1- to 2-family houses	1,596.0	1,425.4	1,189.8	+ 12.0
Multifamily	236.2	203.6	160.8	+ 16.0
Commercial	525.1	462.2	350.4	+ 13.6
Farm	99.6	108.3	112.8	- 8.0
Consumer installment credit	585.0	516.4	383.7	+ 13.3

According to the Survey Research Center at the University of Michigan, 62% of U.S. families used any type of credit card in 1983, 54% used one or more retail cards. Use of credit cards rises sharply with family income and with the level of education of the family head. Use on the basis of age of head was highest in the 35-64 age group. About 35% of all families incur credit card finance charges.

DEBT

With college costs rising, and the number of grants declining, students and their parents took out nearly $10 billion in Federal education loans in 1986, according to a recent Congressional report. This is almost triple the amount 10 years ago, on a constant dollar basis, and it does not include billions in bank loans, second mortgages, and loans from relatives. In all, up to half of undergraduates are heavily in debt as they leave school and enter their lowest earning years. A larger percentage of young people's incomes will be going toward debt for a longer period of time than in the past, and this is affecting employment decisions and personal decisions, such as delaying the start of a family, as well as reducing their discretionary income and spending on non-essentials.

According to the Department of Education, in 1986 about one loan in 10 was in default, with delinquent borrowers owing $5 billion out of more than $42 billion in outstanding loans.

CONSUMER SPENDING

Personal consumption expenditures in the third quarter of 1986 were at an annual rate of $2,799.8 billion, 4.6% above the 1985 comparable rate in terms of current dollars, and up 4.5% in terms of an inflation-adjusted constant dollar. Preliminary figures indicate a rise for the year 1986 in spending for all goods and services, on a current dollar basis, of 6.4%, compared with a 7.3% gain in 1985.

Despite a strong year-end finish, propelled by Christmas shoppers and car buyers rushing to claim sales tax deductions for the last time, retail sales for all of 1986 were up only 5.2%. This was the smallest annual gain since a 3% rise in 1982, a recession year, according to the Department of Commerce. In 1985, sales were up 6.3%. (Note: 1986 figures are preliminary).

Total retail sales for the year 1986 were estimated at $1,445 billion compared with $1,374 billion in 1985. Sales of building materials registered the biggest gain of any category, rising 16.1%, reflecting the strong home-buying activity early in the year. Gas station sales declined 14.3%, due to price cuts in gasoline.

A group of economists addressing retailers at the National Retail Merchants Association conference in New York late in January 1986 generally anticipated a slowdown in consumer spending in 1987, with real gain in the area of 2 to 2.75%. General merchandise sales were expected to do better, with a real gain of 5% versus 6.5% in 1986. Cited as contributing factors were the slowdown in gains in real hourly wage rates, and the rate of growth in installment debt. The drop in interest income is another important consideration.

Spending Patterns

The pattern of household growth, as previously noted, differs by age -- and this also means changing patterns in spending. The Consumer Research Center of the Conference Board has prepared indexes on expenditures for specific goods and services by age of household head. These show the deviation from the average (equal to 100) expenditure.

CONSUMER SPENDING

Spending Patterns

As noted in the table, for example, spending for food is highest among households with a head age 45-54. The index is 130.9 - or 30.9% above the average for all households. Households with a head age 35-44 outspend others for apparel, with an index of 143.1 -- 43.1% above average.

Relative Spending By Category Based on Age of Householder: 1985
(Average expenditure for each classification = 100.0)

	Age of Householder					
	Under 25	25-44	35-44	45-54	55-65	65 & Over
Households (thousands)	5,438	20,014	17,481	12,628	13,073	18,155
Average household size	2.3	2.9	3.4	3.2	2.4	1.8
Average household income	$16,643	$26,177	$33,389	$36,002	$30,516	$18,279
Relative expenditures						
Total spending	63.4	102.8	126.1	130.9	99.6	61.6
Selected spending:						
Food at home	56.3	91.8	129.2	131.1	102.5	70.6
Food away from home	72.2	102.4	124.0	136.4	100.8	56.8
Housing	62.3	112.3	125.3	115.9	90.4	69.3
Shelter	69.5	122.9	127.6	111.9	82.6	61.6
Utilities, fuel, etc.	46.8	87.7	119.4	130.6	108.9	83.2
Homefurnishings & equipment	70.1	115.8	130.2	119.7	96.4	51.5
Furniture	87.6	133.4	139.7	100.1	83.2	40.8
Major appliances	63.7	113.8	115.0	133.6	89.2	65.7
Apparel	71.1	104.0	152.1	140.4	86.0	35.4
Men's & boys'	65.0	106.4	152.1	140.4	86.0	35.4
Women's & girls'	64.4	87.6	145.8	140.9	100.1	51.8
Footwear	69.1	103.8	152.3	125.8	89.8	44.2
Transportation	74.0	105.4	124.1	141.2	102.2	48.6
New cars	60.0	103.0	119.6	149.9	109.8	48.1
Health care	33.8	67.9	99.2	116.4	112.6	135.3
Personal care	48.0	73.9	114.8	135.3	123.1	88.8
Recreation	75.2	115.8	143.4	133.8	98.8	44.5
TVs, radios, etc.	95.8	117.8	125.2	123.3	91.2	47.6

Source: American Demographics (October 1986)

Within the above framework, there are differences, of course, based on family composition and life styles, but in general, the indexes point to where the strongest markets are to be found. Further studies show that the pattern in spending varies for married couples with children and those without children. The latter spend significantly more on home furnishing, apparel and transportation. Couples with young children outspend those without children for housing and household operation, utilities and food. Educational levels of household heads also play a role in spending patterns. To an increasing extent, retailers must focus on specific market niches and lifestyles. Basic shifts have occurred in the spending patterns of American consumers over the years.

Spending Patterns

Distribution of Expenditures for Urban Wage Earners: 1939, 1982-84

	1939	1982-84
Total	100.0%	100.0%
Food & beverages	35.4	20.1
Housing	33.7	39.2
Apparel	11.0	6.5
Transportation	8.1	21.2
Medical care	4.1	3.9
Entertainment	2.8	4.1
Other goods & services	4.9	5.0

Source: U.S. Bureau of Labor Statistics

Personal Consumption Expenditures For Selected Product Categories, 1982 - 1985

(Covering the value at retail of all goods (new and used) reaching the consumer through any channel, i.e. retail outlets, premiums, direct sale by manufacturers and wholesalers, raffles, fairs, etc.)

	Billions of Current Dollars (add 000,000)			
	1985(p)	1984(r)	1983(r)	1982(r)
Total disposable personal income	$2,828.0	$2,670.6	$2,428.1	$2,261.4
Total personal consumption expenditures	2,600.5	2,428.2	2,234.5	2,050.7
Durable goods	359.3	331.2	289.1	252.7
Nondurable goods	905.1	870.1	816.7	771.0
Services	1,336.1	1,227.0	1,128.7	1,027.0
Selected Expenditures				
Food & non-alcoholic beverages, total*	407.0	388.4	361.7	341.8
Purchased for off-premise consumption	285.5	274.0	257.1	246.7
Purchased meals & beverages (on-premise consumption)	121.5	114.4	104.6	95.1
Tobacco products	31.8	29.9	28.2	24.7
Alcoholic beverages (for on & off-premise consumption)	53.5	53.0	52.2	49.5
Toilet articles & preparations	23.0	21.9	20.3	18.8
Barbershops, beauty parlors, health clubs, spas	15.6	14.5	13.8	11.7
Drug preparations & sundries (not including products dispensed by doctors, hospitals, etc.)	28.5	26.6	24.4	22.1

(continued)

Personal Consumption Expenditures For Selected Product Categories, 1982 - 1985
(continued)

	Billions of Current Dollars (add 000,000)			
	1985(p)	1984(r)	1983(r)	1982(r)
Selected Expenditures (cont'd.)				
Clothing & accessories, not including standard military clothing, jewelry or footwear (Luggage is included)	132.2%	125.4%	114.7%	105.4%
Women's, girls', infants'	88.7	83.7	76.3	69.5
Women's (age 16 & over) (e)	69.2	65.3	59.9	53.7
Girls', children's (e)	19.5	18.4	16.4	15.8
Men's & boys'	43.5	41.6	38.4	35.9
Men's (e)	35.6	34.1	31.5	28.8
Boys' (e)	7.8	7.5	6.9	7.1
Footwear, total	22.8	21.8	20.2	18.9
Men's (e)	8.1	7.6	7.5	6.6
Women's (age 16 & over) (e)	12.3	11.7	10.4	10.2
Boys', girls', infants' (e)	2.5	2.4	2.3	2.1
Jewelry & watches	21.3	20.0	18.0	16.7
Wheel goods, durable toys, sports equipment, boats, etc.	26.7	23.2	20.4	19.3
Nondurable toys & sport supplies	20.4	19.8	18.0	16.8
Books & maps	8.0	7.8	7.2	6.6
Homefurnishings, total **	140.7	132.2	119.5	107.1
Furniture & bedding (springs, mattresses, etc.)	27.5	26.5	23.8	21.6
Major appliances, electric housewares	23.0	21.7	19.6	17.7
Dinner & tableware, glassware, utensils	12.8	12.2	11.2	10.4
Other durable housefurnishings #	28.4	27.1	24.4	21.5
Semi-durable housefurnishings ##	13.9	13.4	12.3	11.4
Home entertainment (TV, radios, records, musical instruments, etc.)	35.1	31.3	28.2	24.5
Household supplies (cleaning, lighting, paper products, etc.)	6.8	6.5	5.8	5.2

(See footnotes on next page)

(continued)

Personal Consumption Expenditures For Selected Product Categories, 1982 - 1985
(continued)

	% To Total Disposable Income			% To Total Expenditures		
	1985(p)	1984(r)	1982(r)	1985(p)	1984(r)	1982(r)
Selected Expenditures						
Total expenditures	91.9%	90.8%	90.7%	100.0%	100.0%	100.0%
Durable goods	12.7	12.4	11.2	13.8	13.6	12.3
Nondurable goods	32.0	32.6	34.1	34.8	35.8	37.6
Services	47.2	45.9	45.4	51.4	50.5	50.1
Selected Products:						
Food & non-alcoholic beverages, total	14.4	14.5	15.1	15.6	16.0	16.7
Food & beverages for off-premise consumption	10.1	10.3	10.9	11.0	11.3	12.0
Toilet articles & preparations	0.8	0.8	0.8	0.9	0.9	0.9
Footwear	0.8	0.8	0.8	0.9	0.9	0.9
Clothing & accessories, total	4.7	4.7	4.7	5.1	5.2	5.1
Women's, girls', infants'	3.2	3.1	3.1	3.4	3.4	3.4
Men's, boys'	1.5	1.6	1.6	1.7	1.7	1.7
Homefurnishings, total	5.0	4.9	4.7	5.4	5.4	1.8

Note: Columns may not add to totals shown due to rounding of figures and/or expenditure categories included in totals but not separately reported.

(p) preliminary
(r) revised
(e) estimated

* Includes expenditures not separately shown, such as the value of food furnished to government and commercial employees, including military; food produced and consumed on farms, etc.

** The retail value of all types of homefurnishings (appliances, floor coverings, etc.) supplied by builders in new privately-owned housing units are included in personal consumption expenditures. However, such items supplied in rental apartments or other than privately-owned housing are not included.

# Principal furnishings included in "other durable housefurnishings" are floor coverings, blankets, comforters, pillows, picture frames, mirrors, art products, lamps, clocks, writing equipment, hand and power tools. (A durable product is defined as having a useful life of three years or more; nondurables, a useful life of less than three years.)

## Consists mainly of textile homefurnishings except where elsewhere classified, including piece goods for homefurnishings. Also included are lamp shades, brooms and brushes.

Source: Based on reports from the Office of Business Economics,
U.S. Department of Commerce; Bureau of Labor Statistics,
U.S. Department of Labor

CONSUMER PRICES/PURCHASING POWER

Early in 1987, the Bureau of Labor Statistics will issue revised Consumer Price Index figures which will better represent current buying patterns and include a broader range of products and services that have become important components of consumer spending. The 1987 revisions are based on the BLS expenditure surveys covering 1982 through 1984.

For the year 1986, inflation as measured by the CPI, was only 1.1%, the smallest annual increase since 1961. This low rate was due to the 19.7% drop in energy costs; but the underlying trend of nonenergy prices is upward, particularly food prices. Food prices for the year 1986 were up 3.7%; housing, up 1.8%; entertainment, up 3.4%; medical care, up 7.7%. Apparel prices were up only 0.7%; however, with improved coverage, revised CPI indexes on apparel are expected to show a sharper gain.

Inflation is expected to accelerate this year because of firming oil prices and the continuing decline of the dollar, which will make imported goods more expensive and allow American manufacturers more leeway to raise prices.

During the last few years, wage increases have generally outpaced the rise in consumer prices, providing American consumers with a net increase in purchasing power. But in 1987, economists expect that this will not be the case as inflation picks up and increases in earnings slow.

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now -- 1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE: Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well as information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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